

From: Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org>

Sent: Sunday, May 13, 2018 4:34 PM

To: Osborne, Evan W.

Subject: RE: Year-end Report & Renewal

Hi Evan,

Great to hear from you. There's a sample form you can use on [this](#) landing page. You can also submit the report on that page.

As for the remaining funds, is there an activity you'd like to propose to use the remaining amount? If so, feel free to email that off to me. If not, you can have your grants office send it back in the form of a check, here's our address:

Attn: Hussein Hussein

1320 N. Courthouse Rd., Suite 500

Arlington, VA 22201

Best,

[Hussein Hussein](#)

Charles Koch Foundation

Office: [REDACTED]

Cell: [REDACTED]

From: Osborne, Evan W. <evan.osborne@wright.edu>

Sent: Saturday, May 12, 2018 9:35 AM

To: Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org>

Subject: Re: Year-end Report & Renewal

Sent by an external sender

Hello Hussein,

I am getting ready to go on sabbatical, and realized I had not filed a report for this grant yet. What should it look like? Unfortunately, after a good start, for several reasons interest fell the second time I ran my group, and as a result still I have about \$5200 that I can return if you would like and such a thing as possible.

Evan Osborne

Professor of Economics

Author, Self-Regulation and Human Progress: How Society Gains When We Govern Less (newly released, Stanford University Press)

<http://sup.org/books/title/?id=25942>

“The kind of man who demands that government enforce his ideas is always the kind whose ideas are idiotic.” — H.L. Mencken

On Apr 18, 2017, at 1:25 PM, Hussein, Hussein
<Hussein.Hussein@charleskochfoundation.org> wrote:

Hi Evan,

Yes, that's correct, please excuse my previous email. No need to send in a report after every semester, we can circle back when you're close to using up the funds for this cycle and take it from there.

Best,

Hussein Hussein

Charles Koch Foundation

Office: [REDACTED]

Cell: [REDACTED]

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]

Sent: Tuesday, April 18, 2017 11:42 AM

To: Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org>

Subject: Re: Year-end Report & Renewal

Sent by an external sender

Actually, the approval of the grant and setting up of the infrastructure by our university was so late that my understanding was that it was for the 2017 calendar year. So I haven't come close to exhausting the grant yet. If you want a report for one semester of work I can certainly provide one, but I was planning to

finish up grant-related activity in November.

Let me know.

Evan

"The opportunity cost of enchanting one's fellow economists is alienating noneconomists. There is no such thing as a free argument." – Deirdre N. McCloskey.

On Apr 18, 2017, at 11:18 AM, Hussein, Hussein
<Hussein.Hussein@charleskochfoundation.org> wrote:

Hi Evan,

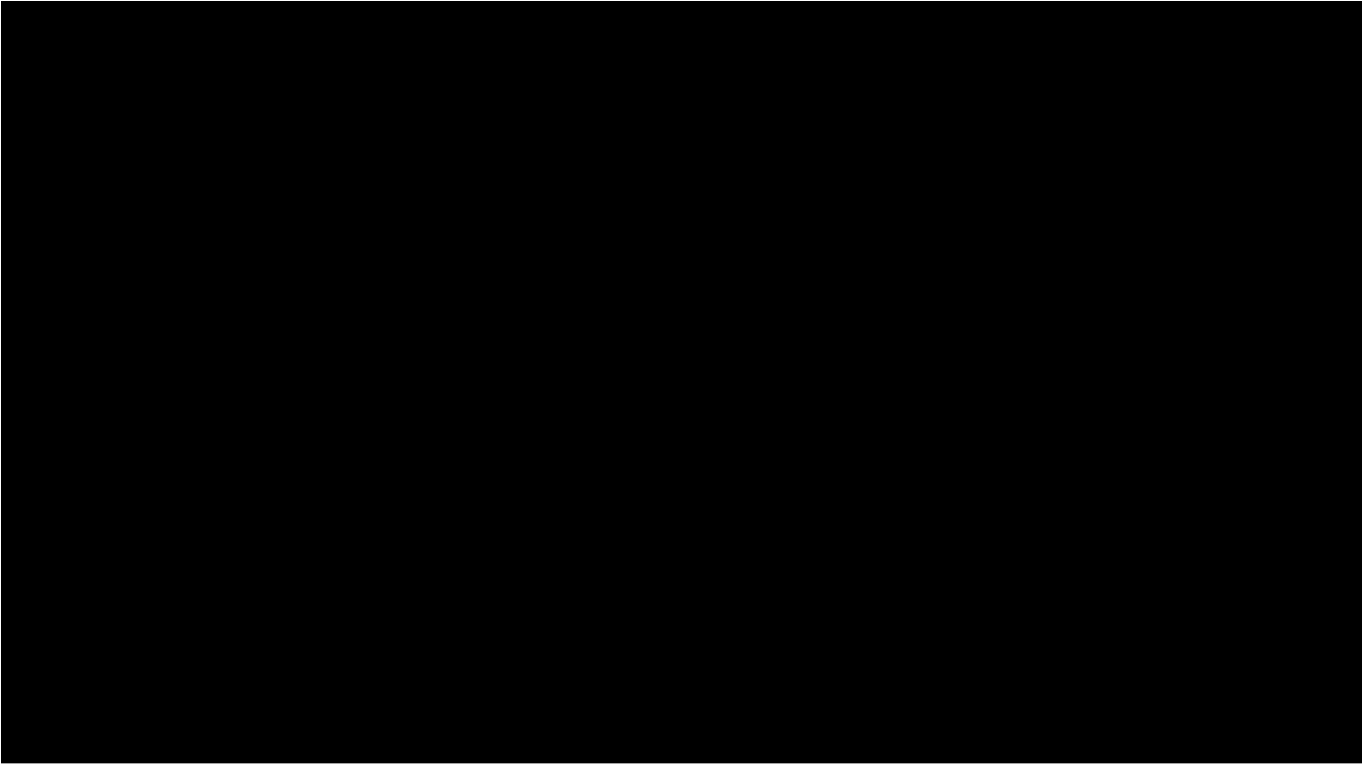
I hope all is well. With the Spring semester coming to an end next month, I wanted to touch base and see if this is a good time for you to discuss the year-end report, as well as a potential renewal of your existing grant. If so, I've included a link below to a landing page where your report can be submitted. I'm happy to schedule a quick call to discuss this new reporting process in further detail.

If this timing doesn't work for your schedule, please let me know and I'll be happy to circle back with you at a later date.

Link to Landing Page (Sample year-end report included on the landing page): <https://charleskochfoundation.tfaforms.net/343735>

Best,

Hussein Hussein
Charles Koch Foundation
Office: [REDACTED]
Cell: [REDACTED]



From: Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org>

Sent: Tuesday, April 18, 2017 1:25 PM

To: Osborne, Evan W.

Subject: RE: Year-end Report & Renewal

Hi Evan,

Yes, that's correct, please excuse my previous email. No need to send in a report after every semester, we can circle back when you're close to using up the funds for this cycle and take it from there.

Best,

Hussein Hussein

Charles Koch Foundation

Office: [REDACTED]

Cell: [REDACTED]

From: Osborne, Evan W. [mailto:evan.osborne@wright.edu]

Sent: Tuesday, April 18, 2017 11:42 AM

To: Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org>

Subject: Re: Year-end Report & Renewal

Sent by an external sender

Actually, the approval of the grant and setting up of the infrastructure by our university was so late that my understanding was that it was for the 2017 calendar year. So I haven't come close to exhausting the grant yet. If you want a report for one semester of work I can certainly provide one, but I was planning to finish up grant-related activity in November.

Let me know.

Evan

"The opportunity cost of enchanting one's fellow economists is alienating noneconomists. There is no such thing as a free argument." – Deirdre N. McCloskey.

On Apr 18, 2017, at 11:18 AM, Hussein, Hussein
<Hussein.Hussein@charleskochfoundation.org> wrote:

Hi Evan,

I hope all is well. With the Spring semester coming to an end next month, I wanted to touch base and see if this is a good time for you to discuss the year-end report, as well as a potential renewal of your existing grant. If so, I've included a link below to a landing page where your report can be submitted. I'm happy to schedule a quick call to discuss this new reporting process in further detail. If this timing doesn't work for your schedule, please let me know and I'll be happy to circle back with you at a later date.

Link to Landing Page (Sample year-end report included on the landing page):

<https://charleskochfoundation.tfaforms.net/343735>


Best,

Hussein Hussein

Charles Koch Foundation

Office: [REDACTED]

Cell: [REDACTED]



From: Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org>

Sent: Tuesday, April 18, 2017 11:18 AM

To: Osborne, Evan W.

Subject: Year-end Report & Renewal

Hi Evan,

I hope all is well. With the Spring semester coming to an end next month, I wanted to touch base and see if this is a good time for you to discuss the year-end report, as well as a potential renewal of your existing grant. If so, I've included a link below to a landing page where your report can be submitted. I'm happy to schedule a quick call to discuss this new reporting process in further detail.

If this timing doesn't work for your schedule, please let me know and I'll be happy to circle back with you at a later date.

Link to Landing Page (Sample year-end report included on the landing page):

<https://charleskochfoundation.tfaforms.net/343735>

Best,

Hussein Hussein
Charles Koch Foundation
Office: [REDACTED]
Cell: [REDACTED]

From: Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org>

Sent: Thursday, March 23, 2017 4:18 PM

To: Osborne, Evan W.

Subject: RE: Quick Update

Evan,

It was great speaking with you as well. I'm happy to provide some suggestions on speakers within those topics. Below are two tables with the suggested speaker's name, institution, and their area of expertise.

Academic Freedom/Free Speech:

Faculty Name:	Institution:	Area of Expertise:
Bradley Hobbs	Clemson University	Economic freedom, academic freedom; property rights
Kevin Vallier	Bowling Green State University	Free Speech
Richard Vedder	Ohio University	Free Speech
Brian Ogstad	Amagi Productions	Free speech; economic and individual liberties
David Hudson	Vanderbilt University	Free speech;

Economic Development of Impoverished Populations/Regions

Faculty Name:	Institution:	Area of Expertise:
Chris Fawson	Utah State University	Economic development of rural communities; health care and education markets
Bob Lawson	Southern Methodist University	Economic growth
Virgil Storr	Mercatus Center	Community recovery and redevelopment
Claudia Williamson	Mississippi State University	International development; property rights; informal institutions
Thomas Rustici	George Mason University	Public policy, economic development

If you have any questions about these suggestions, please let me know. If any of them fit the vision of your program, I'm happy to facilitate introductions.

Best regards,

Hussein Hussein

Charles Koch Foundation

Office: [REDACTED]

Cell: [REDACTED]

From: Osborne, Evan W. [mailto:evan.osborne@wright.edu]
Sent: Wednesday, March 22, 2017 7:03 PM
To: Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org>
Subject: Re: Quick Update

Sent by an external sender

Mr. Hussein,

Nice talking to you the other day. We chatted about some things it would be helpful to have. What I could use is a speakers' list for the topics of academic freedom, freedom of expression more generally and the role of free markets in improving the welfare of historically excluded groups. If you have such lists that would be great.

Evan Osborne

"There are such things in the world as human rights. They rest upon no conventional foundation, but are external, universal, and indestructible. Among these, is the right of locomotion; the right of migration; the right which belongs to no particular race, but belongs alike to all and to all alike. It is the right you assert by staying here, and your fathers asserted by coming here. It is this great right that I assert for the Chinese and Japanese, and for all other varieties of men equally with yourselves, now and forever. I know of no rights of race superior to the rights of humanity, and when there is a supposed conflict between human and national rights, it is safe to go to the side of humanity." - Frederick Douglass (1869)

From: Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org>
Sent: Tuesday, March 21, 2017 10:01 AM
To: Osborne, Evan W.
Subject: RE: Quick Update

Hi Evan,

Sorry I missed your call. I tried calling you back, with no luck. Can you try me on my office line one more time?

Thanks,

Hussein Hussein

Charles Koch Foundation

Office: [REDACTED]

Cell: [REDACTED]

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]
Sent: Monday, March 20, 2017 3:17 PM
To: Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org>
Subject: Re: Quick Update

Sent by an external sender

Ok, that will be fine. Looking forward to it.

Evan

"The opportunity cost of enchanting one's fellow economists is alienating noneconomists. There is no such thing as a free argument." – Deirdre N. McCloskey.

On Mar 20, 2017, at 2:37 PM, Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org> wrote:

Evan,

My apologies for the delayed response. Yes, Tuesday (03/21) at 10am works for me. would you be able to give me a call on my office line at that time?

I look forward to our call tomorrow morning.

Best,

Hussein Hussein

Charles Koch Foundation

Office: [REDACTED]

Cell: [REDACTED]

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]
Sent: Friday, March 17, 2017 10:21 AM
To: Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org>
Subject: Re: Quick Update

Sent by an external sender

Great, how about Tuesday the 21st at 10 AM?

"The opportunity cost of enchanting one's fellow economists is alienating noneconomists. There is no such thing as a free argument." – Deirdre N. McCloskey.

On Mar 15, 2017, at 2:23 PM, Hussein, Hussein
<Hussein.Hussein@charleskochfoundation.org> wrote:

Good afternoon Evan,

It's nice to e-meet you, I'm glad Kristen had an opportunity to connect us.

If it's alright with you, I'd like to set up a time for us to chat in the near future. Would sometime early next week work for you? Feel free to suggest a date/time and I'll do what I can to make it work on my end.

I look forward to working with you!

Best,

Hussein Hussein
Charles Koch Foundation
Office: [REDACTED]
Cell: [REDACTED]

From: Ellis, Kristin
Sent: Wednesday, March 15, 2017 7:43 AM
To: Osborne, Evan <evan.osborne@wright.edu>
Cc: Hussein, Hussein <Hussein.Hussein@charleskochfoundation.org>
Subject: Quick Update

Evan,

I hope things are going well this semester in regards to the speaker series.

I wanted to reach out to let you know that I am leaving the Foundation. My colleague Hussein Hussein, cc-ed here, will be your point of contact going forward on all matters related to the grant. You're in great hands with Hussein – he has been managing undergraduate, research, and graduate level grants for about two years, and I trust that his expertise will be of value going forward. He has been fully briefed on the details regarding the current grant.

Best wishes,
Kristin

Kristin Ellis

University Investments

Charles Koch Foundation

O: [REDACTED]

M: [REDACTED]

charleskochfoundation.org



From: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>

Sent: Wednesday, March 15, 2017 7:43 AM

To: Osborne, Evan W.

Cc: Hussein, Hussein

Subject: Quick Update

Evan,

I hope things are going well this semester in regards to the speaker series.

I wanted to reach out to let you know that I am leaving the Foundation. My colleague Hussein Hussein, cc-ed here, will be your point of contact going forward on all matters related to the grant. You're in great hands with Hussein – he has been managing undergraduate, research, and graduate level grants for about two years, and I trust that his expertise will be of value going forward. He has been fully briefed on the details regarding the current grant.

Best wishes,
Kristin

Kristin Ellis

University Investments

Charles Koch Foundation

O: 

M: 

charleskochfoundation.org



From: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>

Sent: Monday, December 5, 2016 4:22 PM

To: Osborne, Evan W.

Subject: RE: Speaker themes

Evan,

Thanks so much for reaching out - Steve flipped this to me as I'm your main point of contact for the grant.

Both seem like great ideas - if you think it will resonate on your campus and bring a fresh perspective then I think that's fantastic. The link between innovation and barriers to entry is always an interesting one, and free speech on campus is particularly a concerning and important issue.

Please let me know if I can be of assistance in any way throughout this process.

Kristin

Kristin Ellis

University Investments

Charles Koch Foundation

O: [REDACTED]

M: [REDACTED]

charleskochfoundation.org

-----Original Message-----

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]

Sent: Tuesday, November 22, 2016 10:16 AM

To: Sweet, Stephen <Stephen.Sweet@charleskochfoundation.org>

Subject: Speaker themes

Sent by an external sender

Hi Steve,

I am getting ready to start spending the grant money after the new year. I may organize one panel of

outside speakers, and I want to run two themes by you to see which one more closely approximates the goals of the foundation. The first would be a panel on free women and free markets. Here the people I would invite have both written on the effects of innovation and competition on both the declining household burdens of women and the increasing ability of women to become entrepreneurs. (The two of course are related to some extent.)

The second would be on whether there is a growing problem of hostility to free expression on campus. I would probably invite a couple of academics who have personally experienced attempts to shut them down or punish them for what they say. They have different points of view politically.

If neither of these two is possible to organize from my end, as a back up I may invite people who have written on the immense cost of the local-food movement.

Any thoughts you have would be welcome.

Best,

Evan

"There are particular moments in public affairs when the people, stimulated by some irregular passion, or some illicit advantage, or misled by the artful misrepresentations of interested men, may call for measures which they themselves will afterwards be the most ready to lament and condemn."



From: Boatman, Tammy E.

Sent: Tuesday, September 18, 2018 2:38 PM

To: Osborne, Evan W.

Subject: book group fund info

Tammy Boatman

Administrative Specialist

Department of Economics

290 Rike Hall

3640 Colonel Glenn Hwy

Dayton, Ohio 45435

Office [REDACTED] | Fax [REDACTED]

tammy.boatman@wright.edu



Fiscal Year: 2019 / Fiscal Period: 03 / Report Mode: Detail							
Fund	Osborne Book Group Fund						
Orgn	Economics						
	Adopted Budget	Adjusted Budget	Current Month Actuals	YTD	Open Commitmts	Available Balance	
Balance Available Carryover	\$0.00	\$5,277.31	\$0.00	\$0.00	\$0.00	\$5,277.31	
Subtotal Direct Expenditures	\$0.00	\$5,277.31	\$0.00	\$0.00	\$0.00	\$5,277.31	
Total fund-org	\$0.00	\$5,277.31	\$0.00	\$0.00	\$0.00	\$5,277.31	

WSU Credit Card
Monthly Transaction Log

Month / Year: January 2017
Fund-Organization Activity: 190000-243000-EC

Cardholder's Name: Evan Osborne
Location / Phone: 290 Rike Hall

Date	Vendor Name	Description of Purchase/Business Purpose	Transfer To Fund/Ord #	Journal Voucher Number	Amount	Shipping	Final Cost
1/17/2017	Amazon.com	Purchase books for grant funded book group			\$66.84	\$0.00	\$66.84
1/19/2017	Dayton Airport Parking	Pick up professor candidate Willardsen			\$4.00	\$0.00	\$4.00
1/20/2017	Jeet India Restaurant	Dinner with candidate Willardsen & professors			\$53.83		\$53.83
1/22/2017	Pasha Grill	Dinner with candidate Munro and professors			\$109.71		\$109.71
1/27/2017	Wind's Café	Dinner with candidate Wang and professors			\$114.25		\$114.25
1/28/2017	Amazon.com	Additional books for grant funded book group			\$43.76		\$43.76
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00

Reviewed by: Evan Osborne

Evan Osborne

Date 01/21/17

\$392.39

Approved by Supervisor:

[Signature]

Date 3/21/2017

TOTAL

Business Manager: Roberta Donaldson

Roberta Donaldson

Date 3-28-17

01/22/17
Please notice Dr. Osborne has pld turned on all purchases!
See attached notes. I have shown him we cannot do this. I have told him I have an Economic Amazon account set up tax exempt.

Rec'd back 03/29/17 pm

Roberta did not advise what she did

about all the taxes Osborne paid w/ the credit card.

1/20/17

WSU Credit Card
Monthly Transaction Log

Month / Year: February 2017
Fund-Organization Activity: 190000-243000-EC

Cardholder's Name: Evan Osborne
Location / Phone: 290 Rike Hall

Date	Vendor Name	Description of Purchase/Business Purpose	Transfer To Fund/Org #	Journal Voucher Number	Amount	Shipping	Final Cost
2/15/2017	Amazon.com	books for discussion group grant			\$10.94		\$10.94
2/22/2017	Amazon.com	books for discussion group grant			\$120.08		\$120.08
2/22/2017	Amazon.com	books for discussion group grant			\$103.78		\$103.78
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00
							\$0.00

Reviewed by: Evan Osborne

Date 03/13/17

Approved by Supervisor:

Date

Business Manager: I

Sorry, both my red folders are gone. With you? Anyway here is Evan's CC statement he paid tax on everything again.

- He said just tell them he will pay the university back.

Note: \$234.78 TOTAL

I have never gotten February back from Rekota. This time I taped notes to the reconciliation because there has been no action had kept copies the

WSU Credit Card
Monthly Transaction Log

Month / Year: March 2017*
Fund-Organizati Activity: 190000-243000-EC

Cardholder's Name: Evan Osborne
Location / Phone: 290 Rike Hall

[illegible]

Reconciled by: Karla Truman

Reviewed by: Evan Osborne

Approved Bus Mgr: Roberta Donaldson

Supervisor

Karley Furman
 Clerk
 Edwina, Madison
 June 9

Date April 10, 2017

April 10, 2017

Date 4/11/17

\$1,190.72
TOTAL

Sept.

Cardholder's Name: Evan Osborne
Location / Phone: 275 Rike Hall, Ext. 4599

\$139.62
TOTAL

Date 12/18/17

Date 10/18/17

**WSU Credit Card
Monthly Transaction Log**

Month / Year: October 2017
Fund-Organiz: zation-Activity: 190000-243000-EC

Cardholder's Name: Evan Osborne, Ph.D.
Location / Phone: 275 Rike Hall; x4599

[illegible]

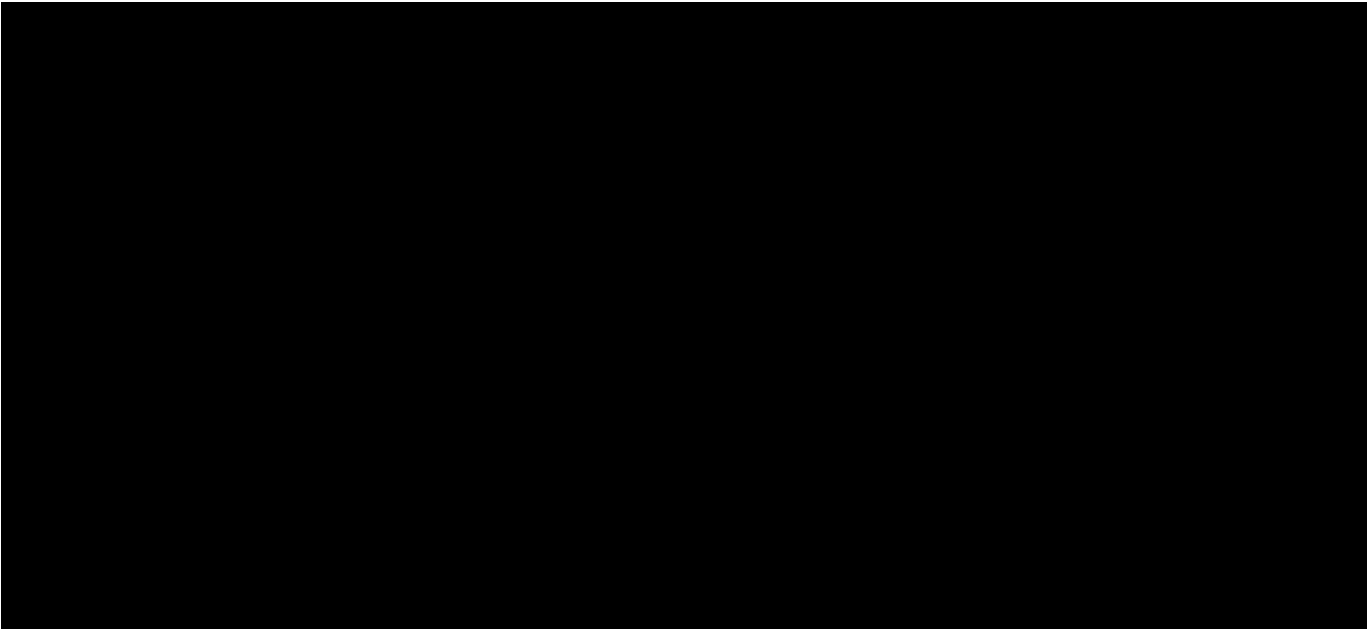
\$327.24
TOTAL

Reviewed by: Evan Osborne

Business Manager: Roberta Donaldson

Date 11/17/17

Date 11/27/17



From: Osborne, Evan W.
Sent: Tuesday, June 28, 2016 10:10 AM
Cc: Henry, Mary Jean; Ruhl, Jennifer
Subject: Re: C. Koch Foundation

How should we proceed? I have never applied for a grant through your offices before, but I spoke to someone at the foundation. He seems pretty excited about it, and would like to get started quickly.

One complication is that for the rest of the summer I will be in Colorado, although available by phone and email. I am thinking about asking for the grant for the calendar year 2017.

Sent from my iPhone

On Jun 28, 2016, at 9:25 AM, Lundin, Deborah Lynn <deborah.lundin@wright.edu> wrote:

Mary Jean,

Thanks for the quick turnaround review.

Dr. Osborne, if you haven't already begun, please coordinate the submission of this proposal with the Office of Advancement, and I wish you the best of luck on it.

Appreciatively,

Deborah

Deborah Lundin, Ed.D., CRA
Associate Director, Pre Award Services
Research and Sponsored Programs

240 University Hall
Wright State University
3640 Colonel Glenn Highway
Dayton, Ohio 45435-0001
(p) [REDACTED] (f) [REDACTED]
<http://www.wright.edu/research/research-and-sponsored-programs>

RSP INTERNAL

DEADLINES

****5 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE RSP MUST RECEIVE: THE FINAL BUDGET (REQUESTED AND COST SHARE), BUDGET JUSTIFICATION, AND ABSTRACT.***

****2 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE, THE COMPLETE PROPOSAL READY FOR SUBMISSION IS DUE AT RSP.***

From: Henry, Mary Jean
Sent: Friday, June 24, 2016 1:47 PM
To: Lundin, Deborah Lynn <deborah.lundin@wright.edu>
Cc: Osborne, Evan W. <evan.osborne@wright.edu>; Ruhl, Jennifer <jennifer.ruhl@wright.edu>
Subject: RE: RE: C. Koch Foundation

Hello Deborah,

Thank you for bringing this to my attention. Upon review of the attachment and the Koch website, it appears to me that it would come through the Wright State University Foundation. A few indicators that it would be considered a "gift" are the fact that they don't fund overhead, and it doesn't appear that there are any tight restrictions on "owning" any of the results or activities in any way. Although, I was unable to find any information on grant reporting requirements.

I encourage Dr. Osborne to coordinate this application through my office, and also to include Jennifer Ruhl, the RSCOB Director of Development (copied here).

Hope this helps.

Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building

3640 Colonel Glenn Hwy.
Dayton, OH 45435

██████████ (Office)

██████████ (Fax)

██████████ (Cell)

From: Lundin, Deborah Lynn
Sent: Friday, June 24, 2016 11:29 AM
To: Henry, Mary Jean
Cc: Osborne, Evan W.
Subject: RE: C. Koch Foundation
Importance: High

Good morning, Mary Jean,

Dr. Evan Osborne, Professor of Economics in the RSCOB (copied on this email), is interested in pursuing the Charles Koch Foundation for a project interest. At first blush it is unclear if it should come through RSP or through your area. The word charitable comes up a time or two, though in larger reference to a category of acceptable activities. Could you review at your earliest convenience for your recommendation so that Dr. Osborne can move forward with his proposal with the office most appropriate to facilitating its submission?

Thank you!

Deborah

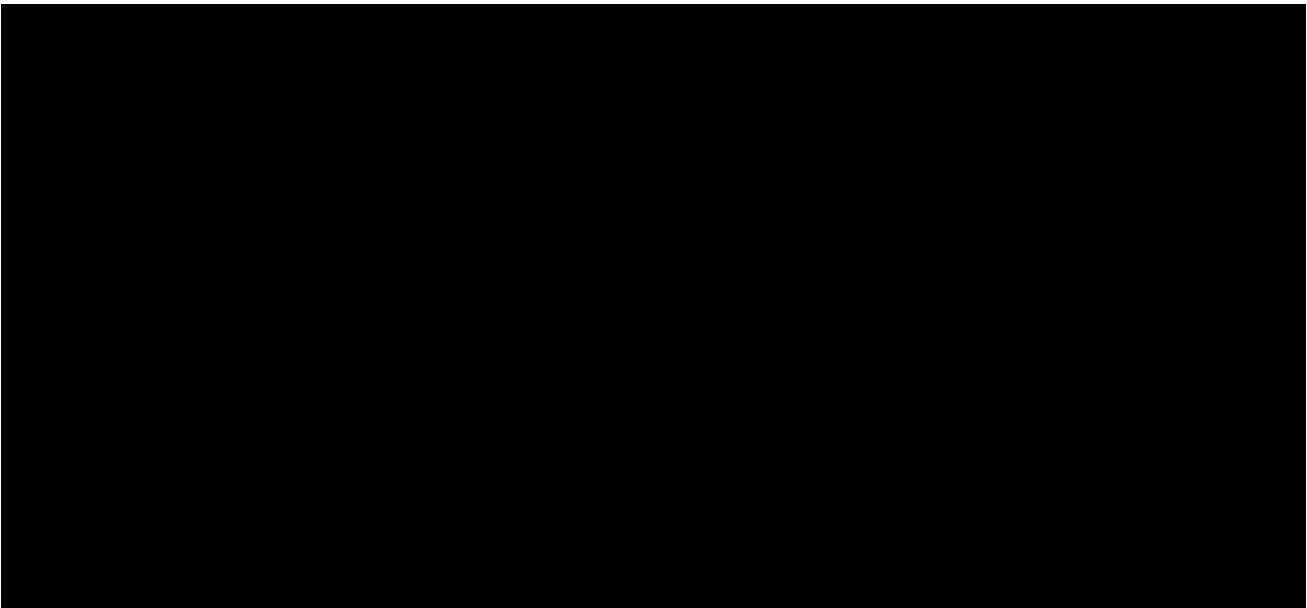
Deborah Lundin, Ed.D., CRA
Associate Director, Pre Award Services
Research and Sponsored Programs
240 University Hall
Wright State University
3640 Colonel Glenn Highway
Dayton, Ohio 45435-0001
(p) ██████████ (f) ██████████
<http://www.wright.edu/research/research-and-sponsored-programs>

RSP INTERNAL

DEADLINES

****5 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE RSP MUST RECEIVE: THE FINAL BUDGET (REQUESTED AND COST SHARE), BUDGET JUSTIFICATION, AND ABSTRACT.***

****2 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE, THE COMPLETE PROPOSAL READY FOR SUBMISSION IS DUE AT RSP.***



From: Osborne, Evan W.
Sent: Wednesday, June 29, 2016 7:34 PM
To: Henry, Mary Jean
Cc: Ruhl, Jennifer
Subject: Re: C. Koch Foundation

They award grants on an ongoing basis. They gave me a model letter for you to use in soliciting the grant on my behalf. I can send it to either of you if you'd like.

Sent from my iPad

On Jun 29, 2016, at 4:17 PM, Henry, Mary Jean <mary.jean.henry@wright.edu> wrote:

Dr. Osborne,

Yes, it would probably be helpful in we spoke in person about this opportunity. Our office provides coordination and oversight for foundation applications, but we do not offer many of the services you may be used to receiving when working with Research and Sponsored Programs. We can talk about the process and how to best collaborate.

I am out on vacation much of the month of July, but here are some dates/times I am available (Ohio time):
July 25, 26, 27, 28, 29 at 10:00 or 1:00. Please let me know if any of these times would work for you.

One quick question—is there an application deadline? I couldn't see one.

Regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations

Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

[REDACTED] (Office)

[REDACTED] (Fax)

[REDACTED] (Cell)

From: Osborne, Evan W.
Sent: Tuesday, June 28, 2016 10:10 AM
Cc: Henry, Mary Jean; Ruhl, Jennifer
Subject: Re: C. Koch Foundation

How should we proceed? I have never applied for a grant through your offices before, but I spoke to someone at the foundation. He seems pretty excited about it, and would like to get started quickly.

One complication is that for the rest of the summer I will be in Colorado, although available by phone and email. I am thinking about asking for the grant for the calendar year 2017.

Sent from my iPhone

On Jun 28, 2016, at 9:25 AM, Lundin, Deborah Lynn <deborah.lundin@wright.edu> wrote:

Mary Jean,

Thanks for the quick turnaround review.

Dr. Osborne, if you haven't already begun, please coordinate the submission of this proposal with the Office of Advancement, and I wish you the best of luck on it.

Appreciatively,

Deborah

Deborah Lundin, Ed.D., CRA
Associate Director, Pre Award Services
Research and Sponsored Programs
240 University Hall
Wright State University
3640 Colonel Glenn Highway
Dayton, Ohio 45435-0001

(p) [REDACTED] (f) [REDACTED]

<http://www.wright.edu/research/research-and-sponsored-programs>

RSP INTERNAL
DEADLINES

***5 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE RSP MUST RECEIVE THE FINAL BUDGET (REQUESTED AND**

COST SHARE), BUDGET JUSTIFICATION, AND ABSTRACT.

****2 BUSINESS DAYS** PRIOR TO SUBMISSION DEADLINE, THE COMPLETE PROPOSAL READY FOR SUBMISSION IS DUE AT RSP.*

From: Henry, Mary Jean
Sent: Friday, June 24, 2016 1:47 PM
To: Lundin, Deborah Lynn <deborah.lundin@wright.edu>
Cc: Osborne, Evan W. <evan.osborne@wright.edu>; Ruhl, Jennifer <jennifer.ruhl@wright.edu>
Subject: RE: RE: C. Koch Foundation

Hello Deborah,

Thank you for bringing this to my attention. Upon review of the attachment and the Koch website, it appears to me that it would come through the Wright State University Foundation. A few indicators that it would be considered a “gift” are the fact that they don’t fund overhead, and it doesn’t appear that are any tight restrictions on “owning” any of the results or activities in any way. Although, I was unable to find any information on grant reporting requirements.

I encourage Dr. Osborne to coordinate this application through my office, and also to include Jennifer Ruhl, the RSCOB Director of Development (copied here).

Hope this helps.

Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

 (Office)

 (Fax)

 (Cell)

From: Lundin, Deborah Lynn
Sent: Friday, June 24, 2016 11:29 AM
To: Henry, Mary Jean
Cc: Osborne, Evan W.
Subject: RE: C. Koch Foundation
Importance: High

Good morning, Mary Jean,

Dr. Evan Osborne, Professor of Economics in the RSCOB (copied on this email), is interested in pursuing the Charles Koch Foundation for a project interest. At first blush it is unclear if it should come through RSP or through your area. The word charitable comes up a time or two, though in larger reference to a category of acceptable activities. Could you review at your earliest convenience for your recommendation so that Dr. Osborne can move forward with his proposal with the office most appropriate to facilitating its submission?

Thank you!

Deborah

Deborah Lundin, Ed.D., CRA
Associate Director, Pre Award Services
Research and Sponsored Programs
240 University Hall
Wright State University
3640 Colonel Glenn Highway
Dayton, Ohio 45435-0001
(p) [REDACTED] (f) [REDACTED]


<http://www.wright.edu/research/research-and-sponsored-programs>

RSP INTERNAL

DEADLINES

****5 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE RSP MUST RECEIVE: THE FINAL BUDGET (REQUESTED AND COST SHARE), BUDGET JUSTIFICATION, AND ABSTRACT.***

****2 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE, THE COMPLETE PROPOSAL READY FOR SUBMISSION IS DUE AT RSP.***



From: Henry, Mary Jean
Sent: Monday, July 11, 2016 4:24 PM
To: Osborne, Evan W.
Cc: Ruhl, Jennifer
Subject: RE: C. Koch Foundation

Dr. Osborne,

Thank you for your update.

Do you mean that they took your application over the phone? Or did you submit a written document? If you have submitted a written document, please provide me a copy for official record. If not, at the least, please provide me with the name of the project and the amount you have requested so that I can track the data.

I see no need to speak at this time since you have already submitted. Please keep me posted on your progress, as university gift grant applications are required to go through my office for oversight and coordination. Also, please note that any grant funds awarded should be made payable to the Wright State University Foundation.

Regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

 (Office)
 (Fax)
 (Cell)

From: Osborne, Evan W.
Sent: Monday, July 11, 2016 3:19 PM
To: Henry, Mary Jean
Cc: Ruhl, Jennifer
Subject: Re: C. Koch Foundation

As indicated in the message below, I did in fact speak with someone from the foundation just now. I have formally applied for the grant, and the woman I spoke to will run it through their approval committee. She sounded optimistic, and said they might have news for me in 2 to 3 weeks.

Do you still wish to speak? If so, does July 27 at 1 o'clock, Eastern time, work?

EO

Sent from my iPad

On Jul 2, 2016, at 7:01 AM, Osborne, Evan W. <evan.osborne@wright.edu> wrote:

In terms of the meeting time, how about July 27 at 1 o'clock? On July 11 also have a conversation scheduled with someone at the foundation.

Sent from my iPad

On Jun 29, 2016, at 3:17 PM, Henry, Mary Jean <mary.jean.henry@wright.edu> wrote:

Dr. Osborne,

Yes, it would probably be helpful in we spoke in person about this opportunity. Our office provides coordination and oversight for foundation applications, but we do not offer many of the services you may be used to receiving when working with Research and Sponsored Programs. We can talk about the process and how to best collaborate.

I am out on vacation much of the month of July, but here are some dates/times I am available (Ohio time):

July 25, 26, 27, 28, 29 at 10:00 or 1:00. Please let me know if any of these times would work for you.

One quick question—is there an application deadline? I couldn't see one.

Regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

[REDACTED] (Office)

[REDACTED] (Fax)

[REDACTED] (Cell)

From: Osborne, Evan W.
Sent: Tuesday, June 28, 2016 10:10 AM
Cc: Henry, Mary Jean; Ruhl, Jennifer
Subject: Re: C. Koch Foundation

How should we proceed? I have never applied for a grant through your offices before, but I spoke to someone at the foundation. He seems pretty excited about it, and would like to get started quickly.

One complication is that for the rest of the summer I will be in Colorado, although available by phone and email. I am thinking about asking for the grant for the calendar year 2017.

Sent from my iPhone

On Jun 28, 2016, at 9:25 AM, Lundin, Deborah Lynn <deborah.lundin@wright.edu> wrote:

Mary Jean,

Thanks for the quick turnaround review.

Dr. Osborne, if you haven't already begun, please coordinate the submission of this proposal with the Office of Advancement, and I wish you the best of luck on it.

Appreciatively,

Deborah

Deborah Lundin, Ed.D., CRA
Associate Director, Pre Award Services
Research and Sponsored Programs
240 University Hall
Wright State University
3640 Colonel Glenn Highway
Dayton, Ohio 45435-0001
(p) [REDACTED] (f) [REDACTED]
<http://www.wright.edu/research/research-and-sponsored-programs>

RSP INTERNAL
DEADLINES

****5 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE RSP MUST RECEIVE: THE FINAL BUDGET (REQUESTED AND COST SHARE), BUDGET JUSTIFICATION, AND ABSTRACT.***

****2 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE, THE COMPLETE PROPOSAL READY FOR SUBMISSION IS DUE AT RSP.***

From: Henry, Mary Jean
Sent: Friday, June 24, 2016 1:47 PM
To: Lundin, Deborah Lynn <deborah.lundin@wright.edu>
Cc: Osborne, Evan W. <evan.osborne@wright.edu>; Ruhl, Jennifer <jennifer.ruhl@wright.edu>
Subject: RE: RE: C. Koch Foundation

Hello Deborah,

Thank you for bringing this to my attention. Upon review of the attachment and the Koch website, it appears to me that it would come through the Wright State University Foundation. A few indicators that it would be considered a "gift" are the fact that they don't fund overhead, and it doesn't appear that are any tight restrictions on "owning" any of the results or activities in any way. Although, I was unable to find any information on grant reporting

requirements.

I encourage Dr. Osborne to coordinate this application through my office, and also to include Jennifer Ruhl, the RSCOB Director of Development (copied here).

Hope this helps.

Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

[REDACTED] (Office)
[REDACTED] (Fax)
[REDACTED] (Cell)

From: Lundin, Deborah Lynn
Sent: Friday, June 24, 2016 11:29 AM
To: Henry, Mary Jean
Cc: Osborne, Evan W.
Subject: RE: C. Koch Foundation
Importance: High

Good morning, Mary Jean,

Dr. Evan Osborne, Professor of Economics in the RSCOB (copied on this email), is interested in pursuing the Charles Koch Foundation for a project interest. At first blush it is unclear if it should come through RSP or through your area. The word charitable comes up a time or two, though in larger reference to a category of acceptable activities. Could you review at your earliest convenience for your recommendation so that Dr. Osborne can move forward with his proposal with the office most appropriate to facilitating its submission?

Thank you!

Deborah

Deborah Lundin, Ed.D., CRA
Associate Director, Pre Award Services
Research and Sponsored Programs
240 University Hall
Wright State University
3640 Colonel Glenn Highway
Dayton, Ohio 45435-0001

(p) [REDACTED] (f) [REDACTED]

<http://www.wright.edu/research/research-and-sponsored-programs>

RSP INTERNAL

DEADLINES

5 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE **RSP MUST RECEIVE: THE FINAL BUDGET (REQUESTED AND COST SHARE), BUDGET JUSTIFICATION, AND ABSTRACT.*

2 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE, THE COMPLETE PROPOSAL READY FOR SUBMISSION IS DUE AT **RSP.*



From: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>

Sent: Tuesday, October 4, 2016 6:58 PM

To: Osborne, Evan W.

Subject: Check Sent

Evan,

I let Mary Jean Henry in the advancement office know that the check should arrive tomorrow.

Looking forward to hearing about the exciting work you'll be doing next term!

Kristin

Kristin Ellis

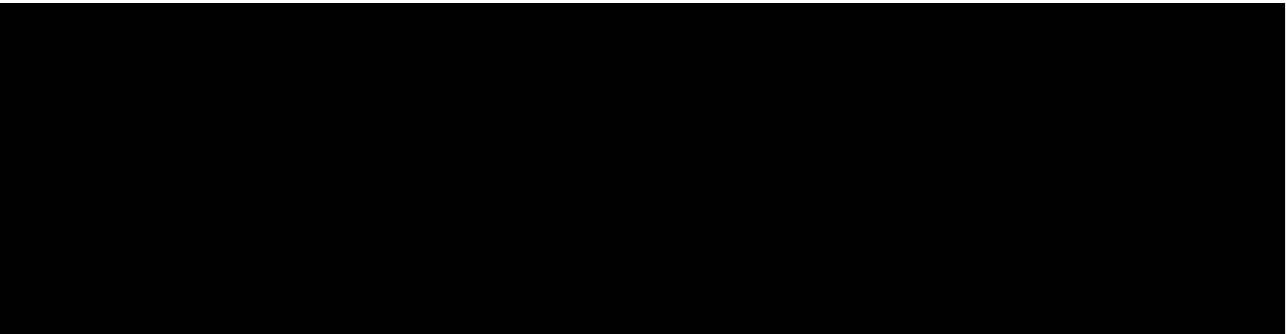
University Investments

Charles Koch Foundation

O: 

M: 

charleskochfoundation.org



From: Sweet, Stephen <Stephen.Sweet@charleskochfoundation.org>

Sent: Friday, June 24, 2016 1:39 PM

To: Osborne, Evan W.

Subject: RE: Grant Template

Evan,

Great speaking with you earlier, glad to hear that the proposal is really coming together! Attached is the (dated) speaker list I mentioned during our conversation. This should be enough you point you in the right direction, hopefully we have an updated speaker list ready to go in a few months.

Let me know if you have any other questions. Have a wonderful weekend!

Steve

Stephen Sweet

Charles Koch Foundation

Direct: 

From: Osborne, Evan W. [mailto:evan.osborne@wright.edu]

Sent: Thursday, June 16, 2016 11:56 AM

To: Sweet, Stephen

Subject: Re: Grant Template

Sent by an external sender

Stephen,

I am starting to put the proposal together. I am thinking about a reading group (perhaps "seminar" sounds classier :)), where I might have occasional guest speakers, including book authors, also come. I have a few in mind, but I don't know what their fees are. First, should I include proposed fees in the budget? Second, does the Foundation have a list of "go-to" speakers who are willing to travel?

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock." - Montaigne.

From: Sweet, Stephen <Stephen.Sweet@charleskochfoundation.org>

Sent: Thursday, June 2, 2016 10:15 AM

To: Osborne, Evan W.

Subject: Grant Template

Evan,

Great speaking with you on Tuesday, I'm glad we were finally able to connect. Apologies for not sending over this document sooner, but attached is the grant template we discussed. Please don't hesitate to let me know if you have any questions.

Best,

Steve

Stephen Sweet

Program Officer, University Investments

Charles Koch Foundation

Direct: [REDACTED]

Charleskochfoundation.org

Name	Institution	E-mail	Potential Topics
» Terry Anderson	Property and Environment Research Center	tla@perc.org	Free market environmentalism and the proper role of government in managing resources
» Hadley Arkes	Amherst College	hparkes@amherst.edu	American founding principles
» Howard Baetjer, Jr.	Towson University	hbaetjer@towson.edu	Economic growth; capital structure evolution; institutional requirements for growth
» Doug Bandow	Cato Institute	dbandow@cato.org	Foreign policy and civil liberties.
» Scott Beaulier	Troy University	sbeaulier@troy.edu	Law and economics; public economics; development and international economics
» Bruce Benson	Florida State University	bbenson@fsu.edu	Law and economics; evolution of legal systems; Native American economics
» Pete Boettke	George Mason University	pboettke@gmu.edu	Market process theory; comparative political economy
» Don Boudreaux	George Mason University	dboudrea@gmu.edu	Nature of law; anti-trust law and economics; international trade
» Karol Boudreaux	Mercatus Center	kboudrea@gmu.edu	Enterprise-based solutions to African poverty
» John Bradbury	Kennesaw State University	jbradbu2@kennesaw.edu	Regulation; telecommunications policy; government transparency
» Jerry Brito	Mercatus Center	gbrito@gmu.edu	Regulation; telecommunications policy; government transparency
» Scott Bullock	Institute for Justice	sbullock@ij.org	Property rights and economic liberty cases in federal and state courts

Name	Institution	E-mail	Potential Topics
» Joseph Calhoun	Florida State University	jcalhoun@fsu.edu	Economics of education; industrial organization; public finance and productivity
» Art Carden	Samford University	wcarden@samford.edu	Economic history; new institutional economics; labor economics; development economics'
» Emily Chamlee-Wright	Washington College & Mercatus Center	echam-leewright2@washcoll.edu	Development economics; cultural economics; Katrina Project
» Tyler Cowen	George Mason University	tcowen@gmu.edu	Why incentives matter in economics; the theory of market failure
» Chris Coyne	George Mason University	ccoyne3@gmu.edu	Economics and happiness; Austrian economics; public choice; law and economics
» Susan Dudley	George Washington University	sdudley@gwu.edu	Public interest in government regulation
» Richard Ebeling	Northwood University—Michigan	ebelingr@northwood.edu	Austrian economics; economic history
» Jerry Ellig	George Mason University	jellig@gmu.edu	Government regulation and business management
» Chris Fawson	Utah State University	Chris.fawson@usu.edu	Economic development of rural communities; health care and education markets
» Rick Geddes	Cornell University	rrg24@cornell.edu	Public policy toward firms; the effects of Sarbanes-Oxley Act on small firms
» Anthony Gill	University of Washington	tgill@u.washington.edu	Religious liberty from an economics viewpoint; religious deregulation; religious competition
» Stephen Gohmann	University of Louisville	sfgohm01@louisville.edu	Entrepreneurship; health care; economic freedom

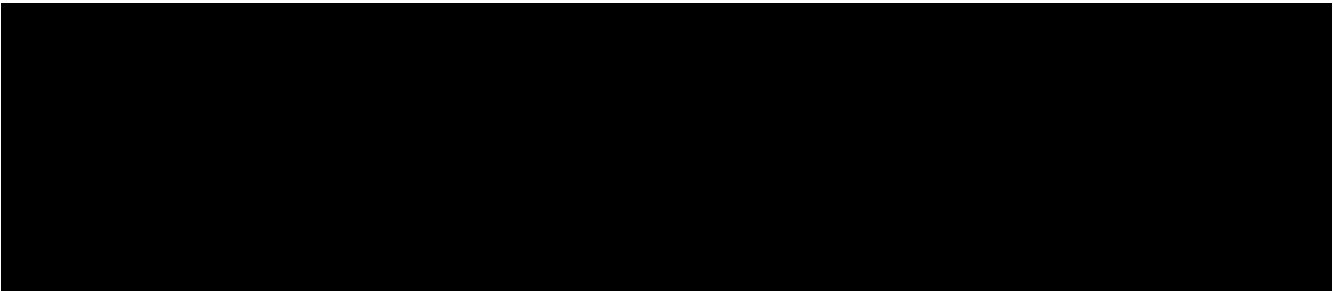
Name	Institution	E-mail	Potential Topics
» Jerry Goolsby	Loyola University—New Orleans	jgoolsby@loyno.edu	Music marketing; marketing theory and ethics; market research
» Josh Hall	West Virginia University	halljo@beloit.edu	Microeconomics; state and local public finance; economic education; entrepreneurship
» David Henderson	Naval Postgraduate School	drhender@nps.edu	Unintended consequences of government regulation; benefits of freedom
» P.J. Hill	Wheaton College	P.J.Hill@wheaton.edu	Institutional development, especially in the American West
» Brad Hobbs	Florida Gulf Coast University	bhobbs@fgcu.edu	Cost efficiency in long-term care institutions; property rights and debt-for-nature swaps
» Lora Holcombe	Florida State University	lholcombe@fsu.edu	School choice
» Randy Holcombe	Florida State University	Holcombe@coss.fsu.edu	Public finance and the economic analysis of policy issues
» Matt Holian	San Jose State University	Matthew.holian@sjsu.edu	Home ownership; police management
» Steve Horowitz	St. Lawrence University	sghorwitz@stlawu.edu	Economics of gender and family; Austrian economics
» Michael Huemer	University of Colorado	lkd3lob02@sneakemail.com	Locke and Hobbes; consent to be governed
» Jeffrey Hummel	San Jose State University	Jhummel@gguol.ggu.edu	Civil War; Federal Reserve
» Lynne Kiesling	Northwestern University	Lkiesling@northwestern.edu	Regulation; restructuring; retail competition

Name	Institution	E-mail	Potential Topics
» Arnold Kling	Mercatus Center	arnoldsk@us.net	Health care; financial crisis
» Bob Lawson	Southern Methodist University	rlawson@smu.edu	Economic growth and development; public finance; labor economics
» Peter Leeson	George Mason University	pleeson@gmu.edu	Economics and pirates
» Edward Lopez	Western Carolina University	edwardjlopez@gmail.com	Regulation; property rights
» Allen Lynch	Mercer University	lynch_ak@mercer.edu	Sports economics; housing bubble; current political topics
» Dirk Mateer	University of Kentucky	dmateer@psu.edu	Teaching economics through videos; making economics more engaging
» Deidre McCloskey	University of Illinois	deirdre2@uic.edu	Economic theory; economic history
» Maurice McTigue	Mercatus Center	mmctigue@gmu.edu	New Zealand reform
» Andrew Morriss	University of Alabama	amorriss@law.ua.edu	Public policy in gas and energy markets
» Michael Munger	Duke University	munger@duke.edu	Price gouging
» Ryan Oprea	University of California - Santa Cruz	roprea@ucsc.edu	Experimental economics; industrial organization
» Jim Otteson	Yeshiva University	jimotteson@gmail.com	History of modern philosophy; political philosophy; history of ethics

Name	Institution	E-mail	Potential Topics
» Ronald Pestritto	Hillsdale College	rpestritto@hillsdale.edu	Changes to the American founding; the Progressive era
» Benjamin Powell	Texas Tech University	benjaminwpowell@gmail.com	Austrian economics; public choice; political economy; sweatshops
» David Prychito	Northern Michigan University	dprychit@nmu.edu	Economic history; Austrian economics
» Paul Rahe	Hillsdale College	prahe@hillsdale.edu	Ancient Greek and Roman history
» Shawn Ritenour	Grove City College	srritenour@gcc.edu	Intersection of Christianity and economics
» Thomas Rustici	George Mason University	trustici@gmu.edu	International economics; economics and public policy; money and banking
» David Schmitz	University of Arizona	schmitz@u.arizona.edu	Ethics; environmental ethics; the philosophy of liberty
» George Selgin	University of Georgia	selgin@uga.edu	Money and banking
» Russell Sobel	The Citadel	Russell.sobel@citadel.edu	Hurricane Katrina; Unleashing Capitalism
» Frank Stephenson	Berry College	Estephenson@berry.edu	Public choice and sports economics
» Elaine Sternberg	University of Miami	e.sternberg@pobox.com	Ethics of capitalism
» Virgil Storr	Mercatus Center	vstorr@gmu.edu	Community recovery and redevelopment; Bahamian studies; culture and markets

Name	Institution	E-mail	Potential Topics
» Alex Tabarrok	George Mason University	tabarrok@gmu.edu	Empirical law and economics; voting theory and alternative institutions; health economics
» Brad Thompson	Clemson University	tthomp2@clemson.edu	Capitalism; role of government; American Revolution
» Mark Thorton	Mises Institute	Mthornton@prodigy.net	Economics of illegal drugs; Civil War; economic bubbles; public finance
» John Tomasi	Brown University	John_Tomasi@brown.edu	Political theory; ethics; public policy
» Nikolai Wenzel	Florida Gulf Coast University	Nikolaiwenzel@hotmail.com	Constitutional economic theory; economic history; Hayek
» Claudia Williamson	Mississippi State University	Claudiawilliamson@gmail.com	International development; property rights; informal institutions
» Bart Wilson	Chapman University	bartwilson@gmail.com	E-commerce; electricity markets; experimental economics
» Gary Wolfram	Hillsdale College	Gwolfram@hillsdale.edu	Affecting public policy with economics; Adam Smith and globalization
» Bruce Yandle	Clemson University	yandle@clemson.edu	Bootleggers and Baptists; environmental economics
» John Ahrens	Hanover College	ahrens@hanover.edu	Constitutional interpretations; moral foundations of markets
» John Bethune	Barton College	jbethune@barton.edu	Economics education; copyright law; the law and economics movement; Adam Smith; Joseph
» Nick Buccola	Linfield College	nicholasbuccola@gmail.com	Frederick Douglass's Philosophy of Liberty

Name	Institution	E-mail	Potential Topics
» Ray DeGennaro	University of Tennessee	rdegenna@utk.edu	Financial crisis; economic approach to ethics
» Art Diamond	University of Nebraska Omaha	adia-mond@mail.unomaha.edu	The innovative entrepreneur as the agent of creative destruction
» Ross Emmett	Michigan State University	emmettr@msu.edu	The Chicago school of economics; markets and morality; T. Robert Malthus; innovation
» Price Fishback	University of Arizona	fishback@email.arizona.edu	Present day implications of the New Deal
» Stephen Hicks	Rockford College	SHicks@rockford.edu	Entrepreneurship and Ethics
» Jeffery Milyo	University of Missouri	milyoj@missouri.edu	American politics; health economics and policy; law and economics
» J. Brian O'Roark	Robert Morris University	ORoark@rmu.edu	The impact of private vs. public funding on sports teams successes.
» Craig Richardson	Winston-Salem State University	richardsoncr@wssu.edu	The rapid collapse of Zimbabwe; China's growth; corporate branding and regulation
» Brian Simpson	National University	bsimpson@nu.edu	The current financial crisis and recession; environmentalism; externalities
» Brian Strow	West Kentucky University	brian.strow@wku.edu	Keynesians Suck: The Myth of Macroeconomics
» Jeffrey Tucker	Laissez-Faire Books	Jef-frey.a.tucker@gmail.com	Henry Hazlitt, Austrian economics, state interventions in daily life
» Tom Woods	Mises Institute	woods@mises.org	Austrian economics, economic history, secession



From: Osborne, Evan W.
Sent: Friday, June 24, 2016 2:33 PM
To: Sweet, Stephen
Subject: Re: Grant Template

Thanks, there are several great names on the list, although I don't know whether I could persuade them to come out to what might be a rather small event.

Either way, I have worked up a budget making fairly pessimistic estimates about expenses, but having said that seems high to me. Let me know if you think this is a reasonable amount to ask for.

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock." - Montaigne.

From: Sweet, Stephen <Stephen.Sweet@charleskochfoundation.org>
Sent: Friday, June 24, 2016 1:39 PM
To: Osborne, Evan W.
Subject: RE: Grant Template

Evan,

Great speaking with you earlier, glad to hear that the proposal is really coming together! Attached is the (dated) speaker list I mentioned during our conversation. This should be enough you point you in the right direction, hopefully we have an updated speaker list ready to go in a few months.

Let me know if you have any other questions. Have a wonderful weekend!

Steve

Stephen Sweet

Charles Koch Foundation
Direct: [REDACTED]

From: Osborne, Evan W. [mailto:evan.osborne@wright.edu]
Sent: Thursday, June 16, 2016 11:56 AM
To: Sweet, Stephen
Subject: Re: Grant Template

Sent by an external sender

Stephen,

I am starting to put the proposal together. I am thinking about a reading group (perhaps "seminar" sounds classier :)), where I might have occasional guest speakers, including book authors, also come. I have a few in mind, but I don't know what their fees are. First, should I include proposed fees in the budget? Second, does the Foundation have a list of "go-to" speakers who are willing to travel?

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock." - Montaigne.

From: Sweet, Stephen <Stephen.Sweet@charleskochfoundation.org>
Sent: Thursday, June 2, 2016 10:15 AM
To: Osborne, Evan W.
Subject: Grant Template

Evan,

Great speaking with you on Tuesday, I'm glad we were finally able to connect. Apologies for not sending over this document sooner, but attached is the grant template we discussed. Please don't hesitate to let me know if you have any questions.

Best,

Steve

Stephen Sweet
Program Officer, University Investments
Charles Koch Foundation
Direct: [REDACTED]
Charleskochfoundation.org

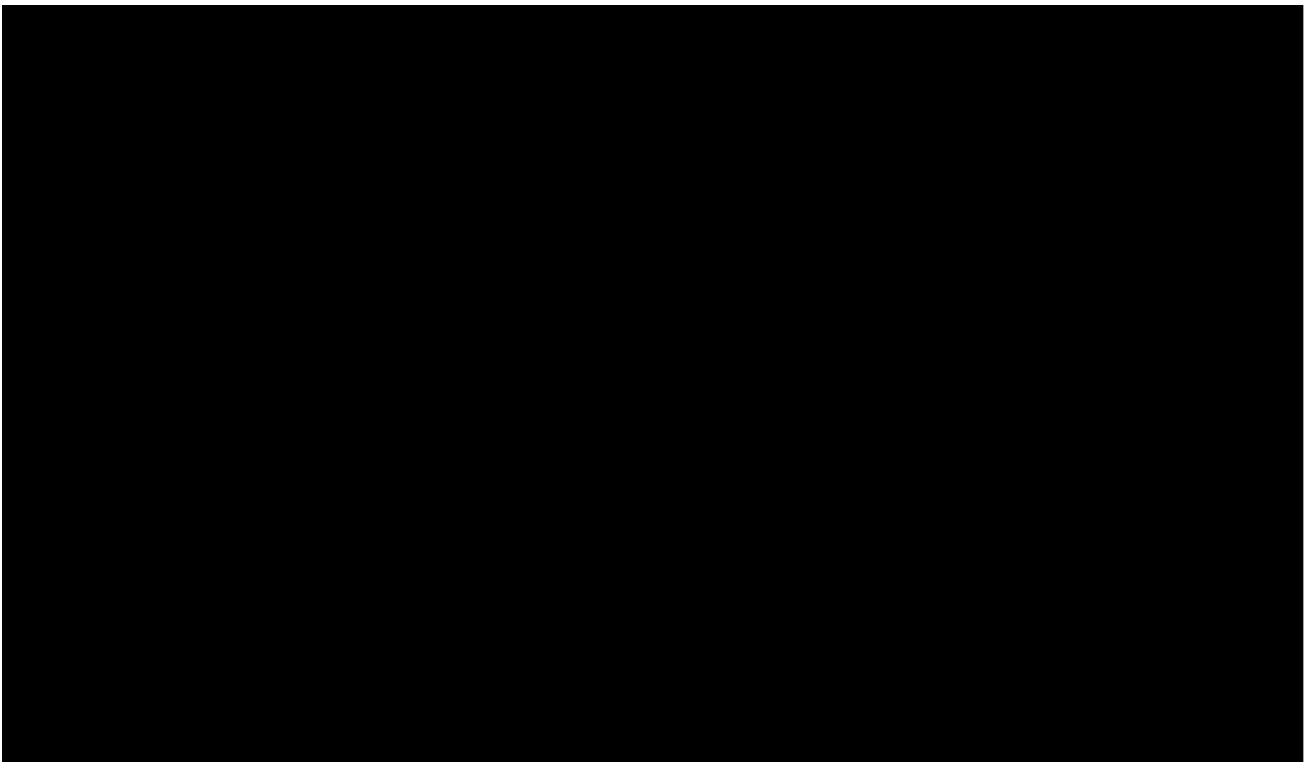
Activity 1: reading group, to meet once a month in the winter and fall semesters. The anticipated participation is as high as 20 students. A book for each month will be selected by me and the students together. Depending on student preference, we may meet on campus, or at nearby coffee shops or restaurants. It is possible that if a contemporary book is selected, the author may be invited to campus to give a talk or hold a discussion. (In this case, the entire campus might be invited.)

Budget:

- Books for students: 20 students, seven months, assumed book price \$30 = **\$4200**
- Food/drink expenses: 20 students, seven months, assumed expenses \$25 per student (assuming we go to restaurant; will be less if held at coffee shop or on campus) = **\$3500**
- For invited authors, an honorarium of up to \$1000 may be paid (I would try to get them for less), as would travel expenses. Travelocity currently lists round-trip flights between Dayton and New York City at \$250, and a hotel close to campus would cost perhaps \$120. Assuming flights might cost as much as \$500 and doing this twice a year, this would equal **\$1240**.

Activity 2: In addition, at most once each semester I propose a separate event, open to the entire campus, in which one or two speakers would be invited to campus to make a speech or have a debate on a theme related to the Charles Koch Foundation's areas of interest. The maximum amount required would be, using the above prices, one night in a hotel plus plane fare, this time for two people, costing as much as **\$2480**.

Total proposed expenditure for the year: **\$11,420**.



From: Sweet, Stephen <Stephen.Sweet@charleskochfoundation.org>

Sent: Tuesday, June 28, 2016 9:26 AM

To: Osborne, Evan W.; Ellis, Kristin

Subject: RE: Grant Template

Evan,

Thanks for sending this proposal over, I think it looks great! I would like to introduce my colleague, Kristin Ellis, who I am CC'ing on this email. Kristin will be running point on your proposal, so I wanted to make sure the two of you were in touch directly. Perhaps we could schedule a quick call later this week to talk through your project and make sure we're all on the same page, that way I can also introduce Kristin to you over the phone. Are you free any time on Wednesday / Thursday of this week?

Best,

Steve

Stephen Sweet

Charles Koch Foundation

Direct: 

From: Osborne, Evan W. [mailto:evan.osborne@wright.edu]

Sent: Friday, June 24, 2016 2:34 PM

To: Sweet, Stephen

Subject: Re: Grant Template

Sent by an external sender

Thanks, there are several great names on the list, although I don't know whether I could persuade them to come out to what might be a rather small event.

Either way, I have worked up a budget making fairly pessimistic estimates about expenses, but having said that seems high to me. Let me know if you think this is a reasonable amount to ask for.

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock." - Montaigne.

From: Sweet, Stephen <Stephen.Sweet@charleskochfoundation.org>

Sent: Friday, June 24, 2016 1:39 PM

To: Osborne, Evan W.

Subject: RE: Grant Template

Evan,

Great speaking with you earlier, glad to hear that the proposal is really coming together! Attached is the (dated) speaker list I mentioned during our conversation. This should be enough you point you in the right direction, hopefully we have an updated speaker list ready to go in a few months.

Let me know if you have any other questions. Have a wonderful weekend!

Steve

Stephen Sweet

Charles Koch Foundation

Direct: 

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]

Sent: Thursday, June 16, 2016 11:56 AM

To: Sweet, Stephen

Subject: Re: Grant Template

Sent by an external sender

Stephen,

I am starting to put the proposal together. I am thinking about a reading group (perhaps "seminar" sounds classier :)), where I might have occasional guest speakers, including book authors, also come. I have a few in mind, but I don't know what their fees are. First, should I include proposed fees in the budget? Second, does the Foundation have a list of "go-to" speakers who are willing to travel?

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock." - Montaigne.

From: Sweet, Stephen <Stephen.Sweet@charleskochfoundation.org>

Sent: Thursday, June 2, 2016 10:15 AM

To: Osborne, Evan W.

Subject: Grant Template

Evan,

Great speaking with you on Tuesday, I'm glad we were finally able to connect. Apologies for not sending over this document sooner, but attached is the grant template we discussed. Please don't hesitate to let me know if you have any questions.

Best,

Steve

Stephen Sweet

Program Officer, University Investments

Charles Koch Foundation

Direct: [REDACTED]

Charleskochfoundation.org



From: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>

Sent: Tuesday, June 28, 2016 6:20 PM

To: Osborne, Evan W.

Subject: RE: Grant Template

Hi Evan-

I'm free from 10 – 3:30pm ET on 7/11, and up until 4pm ET on 7/12 – would either day work for you? If not, we can always find another time.

Excited to speak with you!

Kristin

Kristin Ellis

University Investments

Charles Koch Foundation

O: 

M: 

[charleskochfoundation.org](mailto:kristin.ellis@charleskochfoundation.org)

From: Sweet, Stephen

Sent: Tuesday, June 28, 2016 10:45 AM

To: Osborne, Evan W.

Cc: Ellis, Kristin

Subject: RE: Grant Template

Evan,

Absolutely, we can easily make something work! Kristin will actually be out of the office all of next week, and I will be traveling the 8th – 18th of July, so what might be easiest is for Kristin to just coordinate a time to connect with you directly the week of July 11th, that way we don't have to wait the extra week until I'm back in the country. In the meantime, I will catch Kristin up to speed on our past conversations so that she's in the perfect position to assist from here.

I will let Kristin coordinate with you from here!

Best,

Steve

Stephen Sweet

Charles Koch Foundation

Direct: [REDACTED]

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]**Sent:** Tuesday, June 28, 2016 10:06 AM**To:** Sweet, Stephen**Cc:** Ellis, Kristin**Subject:** Re: Grant Template

Sent by an external sender

I'm about to go to Colorado, leaving tomorrow, for nearly two months. I will be available once I get there, but the trip will take three days. Since I probably won't get there until mid afternoon Mountain Time on Friday, can it wait until Monday? If not, maybe we can arrange to talk during lunch or early afternoon.

Sent from my iPhone

On Jun 28, 2016, at 9:26 AM, Sweet, Stephen <Stephen.Sweet@charleskochfoundation.org> wrote:

Evan,

Thanks for sending this proposal over, I think it looks great! I would like to introduce my colleague, Kristin Ellis, who I am CC'ing on this email. Kristin will be running point on your proposal, so I wanted to make sure the two of you were in touch directly. Perhaps we could schedule a quick call later this week to talk through your project and make sure we're all on the same page, that way I can also introduce Kristin to you over the phone. Are you free any time on Wednesday / Thursday of this week?

Best,

Steve

Stephen Sweet

Charles Koch Foundation

Direct: [REDACTED]

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]**Sent:** Friday, June 24, 2016 2:34 PM**To:** Sweet, Stephen**Subject:** Re: Grant Template

Sent by an external sender

Thanks, there are several great names on the list, although I don't know whether I could persuade them to come out to what might be a rather small event.

Either way, I have worked up a budget making fairly pessimistic estimates about expenses, but having said that seems high to me. Let me know if you think this is a reasonable amount to ask for.

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock."
- Montaigne.

From: Sweet, Stephen <Stephen.Sweet@charleskochfoundation.org>

Sent: Friday, June 24, 2016 1:39 PM

To: Osborne, Evan W.

Subject: RE: Grant Template

Evan,

Great speaking with you earlier, glad to hear that the proposal is really coming together! Attached is the (dated) speaker list I mentioned during our conversation. This should be enough you point you in the right direction, hopefully we have an updated speaker list ready to go in a few months.

Let me know if you have any other questions. Have a wonderful weekend!

Steve

Stephen Sweet

Charles Koch Foundation

Direct: 

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]

Sent: Thursday, June 16, 2016 11:56 AM

To: Sweet, Stephen

Subject: Re: Grant Template

Sent by an external sender

Stephen,

I am starting to put the proposal together. I am thinking about a reading group (perhaps "seminar" sounds classier :)), where I might have occasional guest speakers, including book authors, also come. I have a few in mind, but I don't know what their fees are. First, should I include proposed fees in the budget? Second, does the Foundation have a list of "go-to" speakers who are willing to travel?

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock."
- Montaigne.

From: Sweet, Stephen <Stephen.Sweet@charleskochfoundation.org>

Sent: Thursday, June 2, 2016 10:15 AM

To: Osborne, Evan W.

Subject: Grant Template

Evan,

Great speaking with you on Tuesday, I'm glad we were finally able to connect. Apologies for not sending over this document sooner, but attached is the grant template we discussed. Please don't hesitate to let me know if you have any questions.

Best,

Steve


Stephen Sweet

Program Officer, University Investments

Charles Koch Foundation

Direct: [REDACTED]

Charleskochfoundation.org



From: Osborne, Evan W.
Sent: Monday, July 11, 2016 2:23 PM
To: Ellis, Kristin
Subject: Re: Grant Template

I'm sorry, I must've done the math wrong here in the mountain time zone. I'm available now, and tomorrow at 2 o'clock Mountain time, 12 o'clock eastern time.

Sent from my iPhone

On Jul 11, 2016, at 12:21 PM, Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org> wrote:

Evan,

Gave you a ring a few minutes ago – how about we reschedule? I'm free from 12-4pm ET tomorrow 7/12, and from 230 -330pm on 7/13.

Kristin

Kristin Ellis
University Investments
Charles Koch Foundation
O: [REDACTED]
M: [REDACTED]
charleskochfoundation.org

From: Ellis, Kristin
Sent: Thursday, July 07, 2016 2:27 PM
To: 'Osborne, Evan W.'
Subject: RE: Grant Template

Great – speak then

Kristin Ellis
University Investments
Charles Koch Foundation
O: [REDACTED]
M: [REDACTED]

charleskochfoundation.org

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]
Sent: Thursday, July 07, 2016 2:27 PM
To: Ellis, Kristin
Subject: Re: Grant Template

Sent by an external sender

[REDACTED]

Sent from my iPad

On Jul 7, 2016, at 9:59 AM, Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org> wrote:

Sounds great, Evan – what's the best number to reach you at?

Kristin Ellis

University Investments
Charles Koch Foundation

O: [REDACTED]
M: [REDACTED]
charleskochfoundation.org

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]
Sent: Saturday, July 02, 2016 9:00 AM
To: Ellis, Kristin
Subject: Re: Grant Template

Sent by an external sender

Kristin,

How about 2 o'clock in the afternoon ET on July 11?

Evan

Sent from my iPad

On Jun 28, 2016, at 4:22 PM, Ellis, Kristin
<Kristin.Ellis@charleskochfoundation.org> wrote:

Hi Evan-

I'm free from 10 – 3:30pm ET on 7/11, and up until 4pm ET on 7/12 – would either day work for you? If not, we can always find another time.

Excited to speak with you!
Kristin

Kristin Ellis

University Investments
Charles Koch Foundation

O: [REDACTED]
M: [REDACTED]
charleskochfoundation.org

From: Sweet, Stephen
Sent: Tuesday, June 28, 2016 10:45 AM
To: Osborne, Evan W.
Cc: Ellis, Kristin
Subject: RE: Grant Template

Evan,

Absolutely, we can easily make something work! Kristin will actually be out of the office all of next week, and I will be traveling the 8th – 18th of July, so what might be easiest is for Kristin to just coordinate a time to connect with you directly the week of July 11th, that way we don't have to wait the extra week until I'm back in the country. In the meantime, I will catch Kristin up to speed on our past conversations so that she's in the perfect position to assist from here.

I will let Kristin coordinate with you from here!

Best,

Steve

Stephen Sweet

Charles Koch Foundation
Direct: [REDACTED]

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]

Sent: Tuesday, June 28, 2016 10:06 AM
To: Sweet, Stephen
Cc: Ellis, Kristin
Subject: Re: Grant Template

Sent by an external sender

I'm about to go to Colorado, leaving tomorrow, for nearly two months. I will be available once I get there, but the trip will take three days. Since I probably won't get there until mid afternoon Mountain Time on Friday, can it wait until Monday? If not, maybe we can arrange to talk during lunch or early afternoon.

Sent from my iPhone

On Jun 28, 2016, at 9:26 AM, Sweet, Stephen
<Stephen.Sweet@charleskochfoundation.org> wrote:

Evan,

Thanks for sending this proposal over, I think it looks great! I would like to introduce my colleague, Kristin Ellis, who I am CC'ing on this email. Kristin will be running point on your proposal, so I wanted to make sure the two of you were in touch directly. Perhaps we could schedule a quick call later this week to talk through your project and make sure we're all on the same page, that way I can also introduce Kristin to you over the phone. Are you free any time on Wednesday / Thursday of this week?

Best,

Steve

Stephen Sweet
Charles Koch Foundation
Direct: 

From: Osborne, Evan W.
[<mailto:evan.osborne@wright.edu>]
Sent: Friday, June 24, 2016 2:34 PM
To: Sweet, Stephen

Subject: Re: Grant Template

Sent by an external sender

Thanks, there are several great names on the list, although I don't know whether I could persuade them to come out to what might be a rather small event.

Either way, I have worked up a budget making fairly pessimistic estimates about expenses, but having said that seems high to me. Let me know if you think this is a reasonable amount to ask for.

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock." - Montaigne.

From: Sweet, Stephen
<Stephen.Sweet@charleskochfoundation.org>
Sent: Friday, June 24, 2016 1:39 PM
To: Osborne, Evan W.
Subject: RE: Grant Template

Evan,

Great speaking with you earlier, glad to hear that the proposal is really coming together! Attached is the (dated) speaker list I mentioned during our conversation. This should be enough you point you in the right direction, hopefully we have an updated speaker list ready to go in a few months.

Let me know if you have any other questions.
Have a wonderful weekend!

Steve

Stephen Sweet

Charles Koch Foundation

Direct: [REDACTED]

From: Osborne, Evan W.
[<mailto:evan.osborne@wright.edu>]
Sent: Thursday, June 16, 2016 11:56 AM
To: Sweet, Stephen
Subject: Re: Grant Template

Sent by an external sender

Stephen,

I am starting to put the proposal together. I am thinking about a reading group (perhaps "seminar" sounds classier :)), where I might have occasional guest speakers, including book authors, also come. I have a few in mind, but I don't know what their fees are. First, should I include proposed fees in the budget? Second, does the Foundation have a list of "go-to" speakers who are willing to travel?

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock." - Montaigne.

From: Sweet, Stephen
<Stephen.Sweet@charleskochfoundation.org>
Sent: Thursday, June 2, 2016 10:15 AM
To: Osborne, Evan W.
Subject: Grant Template

Evan,

Great speaking with you on Tuesday, I'm glad we were finally able to connect. Apologies for not sending over this document sooner, but attached is the grant template we discussed. Please don't hesitate to let me know if you have any questions.

Best,

Steve

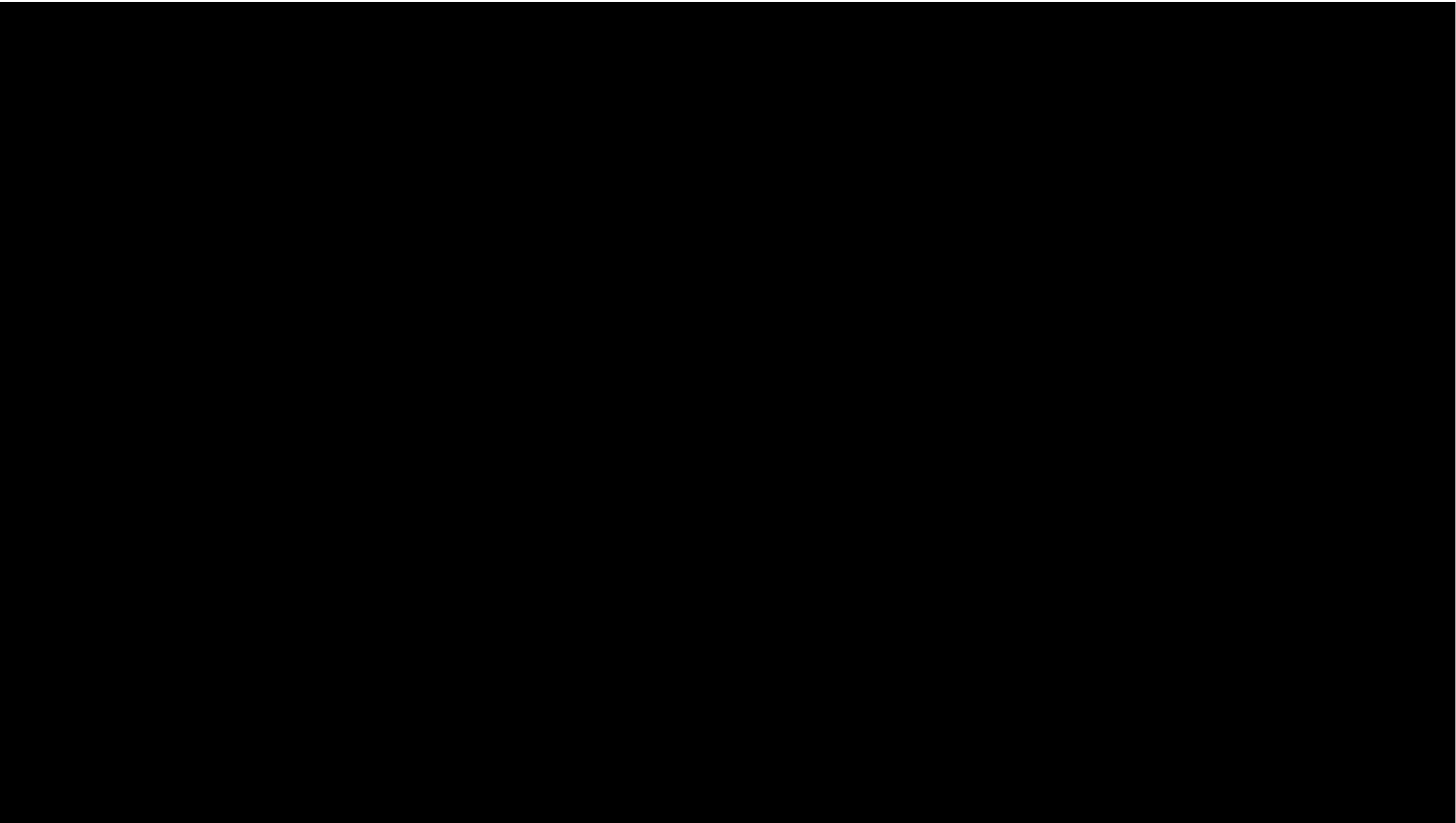
Stephen Sweet

Program Officer, University Investments

Charles Koch Foundation

Direct: [REDACTED]

Charleskochfoundation.org



From: Osborne, Evan W.
Sent: Tuesday, July 12, 2016 1:22 PM
To: Henry, Mary Jean
Subject: Fwd: Grant Template

Ms. Henry,

See the note below. Apparently the information I submitted did not constitute a formal application. That has to come from your office. Do you still wish to speak, or is the form attached clear enough?

I am currently away from my computer, where what I submitted to the Koch foundation is stored, but I will send it later today.

EO
Sent from my iPhone

Begin forwarded message:

From: "Ellis, Kristin" <Kristin.Ellis@charleskochfoundation.org>
Date: July 12, 2016 at 11:09:31 AM MDT
To: "Osborne, Evan W." <evan.osborne@wright.edu>
Subject: RE: Grant Template

Evan,

It was great speaking with you yesterday. I realized I forgot to ask that the university submit a formal request letter using the attached template.

If you have any questions at all, please don't hesitate to reach out. I'll be circling back in a few weeks' time regarding a funding decision and next steps.

Kristin

Kristin Ellis

University Investments
Charles Koch Foundation

O: [REDACTED]
M: [REDACTED]
charleskochfoundation.org

From: Ellis, Kristin
Sent: Monday, July 11, 2016 2:19 PM
To: 'Osborne, Evan W.'
Subject: RE: Grant Template

Evan,

Gave you a ring a few minutes ago – how about we reschedule? I'm free from 12-4pm ET tomorrow 7/12, and from 230 -330pm on 7/13.

Kristin

Kristin Ellis

University Investments
Charles Koch Foundation

O: [REDACTED]
M: [REDACTED]
charleskochfoundation.org

From: Ellis, Kristin
Sent: Thursday, July 07, 2016 2:27 PM
To: 'Osborne, Evan W.'
Subject: RE: Grant Template

Great – speak then

Kristin Ellis

University Investments
Charles Koch Foundation

O: [REDACTED]

M: [REDACTED]
charleskochfoundation.org

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]
Sent: Thursday, July 07, 2016 2:27 PM
To: Ellis, Kristin
Subject: Re: Grant Template

Sent by an external sender

[REDACTED]

Sent from my iPad

On Jul 7, 2016, at 9:59 AM, Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org> wrote:

Sounds great, Evan – what's the best number to reach you at?

Kristin Ellis

University Investments
Charles Koch Foundation

O: [REDACTED]
M: [REDACTED]
charleskochfoundation.org

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]
Sent: Saturday, July 02, 2016 9:00 AM
To: Ellis, Kristin
Subject: Re: Grant Template

Sent by an external sender

Kristin,

How about 2 o'clock in the afternoon ET on July 11?

Evan

Sent from my iPad

On Jun 28, 2016, at 4:22 PM, Ellis, Kristin
<Kristin.Ellis@charleskochfoundation.org> wrote:

Hi Evan-

I'm free from 10 – 3:30pm ET on 7/11, and up until 4pm ET on 7/12 – would either day work for you? If not, we can always find another time.

Excited to speak with you!
Kristin

Kristin Ellis

University Investments
Charles Koch Foundation
O: [REDACTED]
M: [REDACTED]
charleskochfoundation.org

From: Sweet, Stephen
Sent: Tuesday, June 28, 2016 10:45 AM
To: Osborne, Evan W.
Cc: Ellis, Kristin
Subject: RE: Grant Template

Evan,

Absolutely, we can easily make something work! Kristin will actually be out of the office all of next week, and I will be traveling the 8th – 18th of July, so what might be easiest is for Kristin to just coordinate a time to connect with you directly the week of July 11th, that way we don't have to wait the extra week until I'm back in the country. In the meantime, I will catch Kristin up to speed on our past conversations so that she's in the perfect position to assist from here.

I will let Kristin coordinate with you from here!

Best,

Steve

Stephen Sweet

Charles Koch Foundation
Direct: [REDACTED]

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]
Sent: Tuesday, June 28, 2016 10:06 AM
To: Sweet, Stephen

Cc: Ellis, Kristin
Subject: Re: Grant Template

Sent by an external sender

I'm about to go to Colorado, leaving tomorrow, for nearly two months. I will be available once I get there, but the trip will take three days. Since I probably won't get there until mid afternoon Mountain Time on Friday, can it wait until Monday? If not, maybe we can arrange to talk during lunch or early afternoon.

Sent from my iPhone

On Jun 28, 2016, at 9:26 AM, Sweet, Stephen
<Stephen.Sweet@charleskochfoundation.org> wrote:

Evan,

Thanks for sending this proposal over, I think it looks great! I would like to introduce my colleague, Kristin Ellis, who I am CC'ing on this email. Kristin will be running point on your proposal, so I wanted to make sure the two of you were in touch directly. Perhaps we could schedule a quick call later this week to talk through your project and make sure we're all on the same page, that way I can also introduce Kristin to you over the phone. Are you free any time on Wednesday / Thursday of this week?

Best,

Steve

Stephen Sweet
Charles Koch Foundation
Direct: 

From: Osborne, Evan W.
[<mailto:evan.osborne@wright.edu>]
Sent: Friday, June 24, 2016 2:34 PM
To: Sweet, Stephen
Subject: Re: Grant Template

Sent by an external sender

Thanks, there are several great names on the list, although I don't know whether I could persuade them to come out to what might be a rather small event.

Either way, I have worked up a budget making fairly pessimistic estimates about expenses, but having said that seems high to me. Let me know if you think this is a reasonable amount to ask for.

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock." - Montaigne.

From: Sweet, Stephen
<Stephen.Sweet@charleskochfoundation.org>
Sent: Friday, June 24, 2016 1:39 PM
To: Osborne, Evan W.
Subject: RE: Grant Template

Evan,

Great speaking with you earlier, glad to hear that the proposal is really coming together! Attached is the (dated) speaker list I mentioned during our conversation. This should be enough you point you in the right direction, hopefully we have an updated speaker list ready to go in a few months.

Let me know if you have any other questions.
Have a wonderful weekend!

Steve

Stephen Sweet

Charles Koch Foundation

Direct: [REDACTED]

From: Osborne, Evan W.
[<mailto:evan.osborne@wright.edu>]
Sent: Thursday, June 16, 2016 11:56 AM
To: Sweet, Stephen
Subject: Re: Grant Template

Sent by an external sender

Stephen,

I am starting to put the proposal together. I am thinking about a reading group (perhaps "seminar" sounds classier :)), where I might have occasional guest speakers, including book authors, also come. I have a few in mind, but I don't know what their fees are. First, should I include proposed fees in the budget? Second, does the Foundation have a list of "go-to" speakers who are willing to travel?

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock." - Montaigne.

From: Sweet, Stephen
<Stephen.Sweet@charleskochfoundation.org>
Sent: Thursday, June 2, 2016 10:15 AM
To: Osborne, Evan W.
Subject: Grant Template

Evan,

Great speaking with you on Tuesday, I'm glad we were finally able to connect. Apologies for not sending over this document sooner, but attached is the grant template we discussed. Please don't hesitate to let me know if you have any questions.

Best,

Steve

Stephen Sweet

Program Officer, University Investments

Charles Koch Foundation

Direct: [REDACTED]

Charleskochfoundation.org

Grantee Letterhead

Date, 2016

Charles Koch Foundation
1320 North Courthouse Road
Suite 500
Arlington, VA 22201

To whom it may concern:

Wright State University respectfully requests a grant in the amount of \$0.00 to be used for the following activities during the 20XX-XX academic year:

- Research/Student Speaker Series/Center Activities/General Operating Support/etc.

The above program will be under the control and supervision of the Wright State University and the direction of [faculty driver], who was selected by Wright State University.

Should a grant be awarded by the Charles Koch Foundation, a check made payable to [Grantee] should be sent to:

Contact Name

Title

Wright State University

Mailing Address

Mailing Address

[According to IRS records, Wright State University is qualified as an Internal Revenue Code (“Code”) section 501(c)(3) organization and is classified as a public charity pursuant to Code Section [509(a)(1)]/[509(a)(2)]/[509(a)(3) as a type III functionally integrated supporting organization]].

OR

[According to the information furnished with this request, Wright State University is a state instrumentality qualified under Internal Revenue Code (“Code”) section 170(c)(1) or 511(a)(2)(B).]

Any grant awarded shall be expended exclusively for charitable purposes described in Code section 170(c)(2)(B) and no part of the grant will be used for a lobbying purpose or to engage in any political activity.

Please do not hesitate to contact me if you have any questions about the above-mentioned grant request.

[Signature of authorized representative of Wright State University]
Title and Contact Information

From: [Osborne, Evan W.](#)
To: [Culley, Sean](#)
Subject: Fw: Grant Template
Date: Tuesday, September 18, 2018 3:12:15 PM

"There are such things in the world as human rights. They rest upon no conventional foundation, but are external, universal, and indestructible. Among these, is the right of locomotion; the right of migration; the right which belongs to no particular race, but belongs alike to all and to all alike. It is the right you assert by staying here, and your fathers asserted by coming here. It is this great right that I assert for the Chinese and Japanese, and for all other varieties of men equally with yourselves, now and forever. I know of no rights of race superior to the rights of humanity, and when there is a supposed conflict between human and national rights, it is safe to go to the side of humanity." - Frederick Douglass (1869)

From: Henry, Mary Jean
Sent: Wednesday, July 13, 2016 12:27 PM
To: Osborne, Evan W.
Subject: RE: Grant Template

Hello Dr. Osborne,

Thank you for this update.

Yes, I think it would be a good idea for us to speak. Are you still available on July 27 at 1:00.

Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435
[REDACTED] (Office)
[REDACTED] (Fax)
[REDACTED] (Cell)

From: Osborne, Evan W.
Sent: Tuesday, July 12, 2016 1:22 PM
To: Henry, Mary Jean

Subject: Fwd: Grant Template

Ms. Henry,

See the note below. Apparently the information I submitted did not constitute a formal application. That has to come from your office. Do you still wish to speak, or is the form attached clear enough?

I am currently away from my computer, where what I submitted to the Koch foundation is stored, but I will send it later today.

EO

Sent from my iPhone

Begin forwarded message:

From: "Ellis, Kristin" <Kristin.Ellis@charleskochfoundation.org>

Date: July 12, 2016 at 11:09:31 AM MDT

To: "Osborne, Evan W." <evan.osborne@wright.edu>

Subject: RE: Grant Template

Evan,

It was great speaking with you yesterday. I realized I forgot to ask that the university submit a formal request letter using the attached template.

If you have any questions at all, please don't hesitate to reach out. I'll be circling back in a few weeks' time regarding a funding decision and next steps.

Kristin

Kristin Ellis

University Investments
Charles Koch Foundation

O:

M:

charleskochfoundation.org

From: Ellis, Kristin

Sent: Monday, July 11, 2016 2:19 PM

To: 'Osborne, Evan W.'

Subject: RE: Grant Template

Evan,

Gave you a ring a few minutes ago – how about we reschedule? I'm free from 12-4pm ET tomorrow 7/12, and from 230 -330pm on 7/13.

Kristin

Kristin Ellis

University Investments
Charles Koch Foundation
O: [REDACTED]
M: [REDACTED]
charleskochfoundation.org

From: Ellis, Kristin
Sent: Thursday, July 07, 2016 2:27 PM
To: 'Osborne, Evan W.'
Subject: RE: Grant Template

Great – speak then

Kristin Ellis

University Investments
Charles Koch Foundation
O: [REDACTED]
M: [REDACTED]
charleskochfoundation.org

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]
Sent: Thursday, July 07, 2016 2:27 PM
To: Ellis, Kristin
Subject: Re: Grant Template

Sent by an external sender

[REDACTED]

Sent from my iPad

On Jul 7, 2016, at 9:59 AM, Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org> wrote:

Sounds great, Evan – what's the best number to reach you at?

Kristin Ellis

University Investments
Charles Koch Foundation
O: [REDACTED]
M: [REDACTED]
charleskochfoundation.org

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]
Sent: Saturday, July 02, 2016 9:00 AM
To: Ellis, Kristin
Subject: Re: Grant Template

Sent by an external sender

Kristin,

How about 2 o'clock in the afternoon ET on July 11?

Evan

Sent from my iPad

On Jun 28, 2016, at 4:22 PM, Ellis, Kristin
<Kristin.Ellis@charleskochfoundation.org> wrote:

Hi Evan-

I'm free from 10 – 3:30pm ET on 7/11, and up until 4pm ET on 7/12 – would either day work for you? If not, we can always find another time.

Excited to speak with you!
Kristin

Kristin Ellis
University Investments
Charles Koch Foundation
O: 
M: 
charleskochfoundation.org

From: Sweet, Stephen
Sent: Tuesday, June 28, 2016 10:45 AM
To: Osborne, Evan W.
Cc: Ellis, Kristin
Subject: RE: Grant Template

Evan,

Absolutely, we can easily make something work! Kristin will actually be out of the office all of next week, and I will be traveling the 8th – 18th of July, so what might be easiest is

for Kristin to just coordinate a time to connect with you directly the week of July 11th, that way we don't have to wait the extra week until I'm back in the country. In the meantime, I will catch Kristin up to speed on our past conversations so that she's in the perfect position to assist from here.

I will let Kristin coordinate with you from here!

Best,

Steve

Stephen Sweet

Charles Koch Foundation

Direct: [REDACTED]

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]

Sent: Tuesday, June 28, 2016 10:06 AM

To: Sweet, Stephen

Cc: Ellis, Kristin

Subject: Re: Grant Template

Sent by an external sender

I'm about to go to Colorado, leaving tomorrow, for nearly two months. I will be available once I get there, but the trip will take three days. Since I probably won't get there until mid afternoon Mountain Time on Friday, can it wait until Monday? If not, maybe we can arrange to talk during lunch or early afternoon.

Sent from my iPhone

On Jun 28, 2016, at 9:26 AM, Sweet, Stephen

<Stephen.Sweet@charleskochfoundation.org> wrote:

Evan,

Thanks for sending this proposal over, I think it looks great! I would like to introduce my colleague, Kristin Ellis, who I am CC'ing on this email. Kristin will be running point on your proposal, so I wanted to make sure the two of

you were in touch directly. Perhaps we could schedule a quick call later this week to talk through your project and make sure we're all on the same page, that way I can also introduce Kristin to you over the phone. Are you free any time on Wednesday / Thursday of this week?

Best,

Steve

Stephen Sweet

Charles Koch Foundation

Direct: [REDACTED]

From: Osborne, Evan W.
[<mailto:evan.osborne@wright.edu>]
Sent: Friday, June 24, 2016 2:34 PM
To: Sweet, Stephen
Subject: Re: Grant Template

Sent by an external sender

Thanks, there are several great names on the list, although I don't know whether I could persuade them to come out to what might be a rather small event.

Either way, I have worked up a budget making fairly pessimistic estimates about expenses, but having said that seems high to me. Let me know if you think this is a reasonable amount to ask for.

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock." - Montaigne.

From: Sweet, Stephen
<Stephen.Sweet@charleskochfoundation.org>
Sent: Friday, June 24, 2016 1:39 PM
To: Osborne, Evan W.
Subject: RE: Grant Template

Evan,

Great speaking with you earlier, glad to hear that the proposal is really coming together! Attached is the (dated) speaker list I mentioned during our conversation. This should be enough you point you in the right direction, hopefully we have an updated speaker list ready to go in a few months.

Let me know if you have any other questions.
Have a wonderful weekend!

Steve

Stephen Sweet
Charles Koch Foundation
Direct: 

From: Osborne, Evan W.
[<mailto:evan.osborne@wright.edu>]
Sent: Thursday, June 16, 2016 11:56 AM
To: Sweet, Stephen
Subject: Re: Grant Template

Sent by an external sender

Stephen,

I am starting to put the proposal together. I am thinking about a reading group (perhaps "seminar" sounds classier :)), where I might have occasional guest speakers, including book authors, also come. I have a few in mind, but I don't know what their fees are. First, should I include proposed fees in the budget? Second, does the Foundation have

a list of "go-to" speakers who are willing to travel?

Evan

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock." - Montaigne.

From: Sweet, Stephen
<Stephen.Sweet@charleskochfoundation.org>
Sent: Thursday, June 2, 2016 10:15 AM
To: Osborne, Evan W.
Subject: Grant Template

Evan,

Great speaking with you on Tuesday, I'm glad we were finally able to connect. Apologies for not sending over this document sooner, but attached is the grant template we discussed. Please don't hesitate to let me know if you have any questions.

Best,

Steve

Stephen Sweet
Program Officer, University Investments
Charles Koch Foundation
Direct: [REDACTED]
Charleskochfoundation.org

From: [Osborne, Evan W.](#)
To: [Culley, Sean](#)
Subject: Fw: Koch Application
Date: Tuesday, September 18, 2018 3:11:52 PM
Attachments: [WSU Koch Grant Request Letter.docx](#)
[CKF Proposal with MJ Comments.docx](#)

"There are such things in the world as human rights. They rest upon no conventional foundation, but are external, universal, and indestructible. Among these, is the right of locomotion; the right of migration; the right which belongs to no particular race, but belongs alike to all and to all alike. It is the right you assert by staying here, and your fathers asserted by coming here. It is this great right that I assert for the Chinese and Japanese, and for all other varieties of men equally with yourselves, now and forever. I know of no rights of race superior to the rights of humanity, and when there is a supposed conflict between human and national rights, it is safe to go to the side of humanity." - Frederick Douglass (1869)




From: Henry, Mary Jean
Sent: Monday, August 22, 2016 12:29 PM
To: Osborne, Evan W.
Subject: FW: Koch Application

Congrats on the new title—and good luck!
Once we have your final proposal, we can submit....see my attached comments on your original draft.

Keep me posted.

Thank you,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

 (Office)
 (Fax)
 (Cell)

From: Henry, Mary Jean
Sent: Monday, August 22, 2016 12:18 PM
To: Osborne, Evan W.
Subject: FW: Koch Application

Hello Dr. Osborne,

Hope you are doing well.

Wanted to check with you to see if you still plan to apply to Koch?

Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

 (Office)

 (Fax)

 (Cell)

From: Henry, Mary Jean
Sent: Wednesday, July 27, 2016 2:11 PM
To: Osborne, Evan W.
Cc: Jennifer Ruhl (jennifer.ruhl@wright.edu)
Subject: Koch Application

Hello Dr. Osborne,

Nice to "meet" you via phone today.

As discussed, I've attached the draft cover letter and also your draft proposal where I have included some comments for your consideration to help describe the project and strengthen the proposal.

Also per our discussion, I've copied Jennifer Ruhl to bring her in the loop and to make sure

that RSCOB is aware of your proposal.

Please let me know if you have any questions.

Hopefully we should be able to have this completed and ready for submission by the end of the week.

Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

 (Office)

 (Fax)

 (Cell)

Foundation Letterhead

Date, 2016

Mr. Stephen Sweet
Charles Koch Foundation
1515 North Courthouse Road
Suite 200
Arlington, VA 22201

To whom it may concern:

Wright State University Foundation respectfully requests a grant in the amount of \$11,420 to be used to support the following program at Wright State University:

- Student Book Review/Discussion for \$XX,XXX

The proposed activities will take place during January 1, 2017 and December 31, 2017.

The above program, which will be under the control and supervision of the Wright State University Foundation and the Wright State University Raj Soin College of Business, will be carried out by Evan W. Osborne, Ph.D., professor of economics.

Should a grant be awarded by the Charles Koch Foundation, a check made payable to the Wright State University Foundation should be sent to:

Mary Jean Henry
Director of Foundation and Corporate Relations
Wright State University
3640 Colonel Glenn Hwy
Dayton, OH 45435

Any grant awarded shall be expended exclusively for charitable purposes described in Code section 170(c)(2)(B) and no part of the grant will be used for a lobbying purpose or to engage in any political activity.

Please do not hesitate to contact me if you have any questions about the above-mentioned grant request.

Mary Jean Henry, M.Ed.
Director of Foundation and Corporate Relations
Wright State University
Office of Advancement
3640 Colonel Glenn Hwy
Dayton, OH 45435

Enclosures:

IRS Non-Profit Determination Letter

Proposal Document

Add an introductory paragraph that includes:

The goal of your project

Types of "topics" that will be addressed through the activities

Description of the students involved (in a certain academic program or class?)

How your activities support the goals/mission of the Koch Foundation

Explain what the benefit is to participating students... what will they do with the new knowledge—what is the impact—how does it advance Koch goals?

Activity one: reading group, to meet once a month in the winter 2016 and fall 2017 semesters. The anticipated participation is as high as 20 students. A book for each month will be selected by me and the students together (Based on what criteria? What Koch-related theme are you focusing on?). Depending on student preference, we may meet on campus, or at nearby coffee shops or restaurants. It is possible that if a contemporary book is selected, the author may be invited to campus to give a talk or hold a discussion. (In this case, the entire campus might be invited.)

Deleted:

Deleted: .

Deleted: depending

Deleted: it

Budget:

Deleted: ¶

- Books for students: 20 students, seven months, assumed book price \$30 = **\$4200**
- Food/drink expenses: 20 students, seven months, assumed expenses \$25 per student (assuming we go to restaurant; will be less if held at coffee shop or on campus) = **\$3500**
- For invited authors, an honorarium of up to \$1000 may be paid (I would try to get them for less), as would travel expenses. Travelocity currently lists round-trip flights between Dayton and New York City at \$250, and a hotel close to campus would cost perhaps \$120. Assuming flights might cost as much as \$500 and doing this twice a year, this would equal **\$1240 each**.

Commented [M Henry1]: I would suggesting going the coffee shop route to lower expenses and then perhaps more students could participate? I think Koch would rather see the funding used for materials than food

Deleted: <#>¶

Activity two: In addition, at most once each semester I propose a separate event in which one or two speakers would be invited to campus to make a speech or have a debate on a theme related to the Charles Koch Foundation's areas of interest. The maximum amount required would be, using the above prices, one night in a hotel plus plane fare, this time for two people, costing as much as **\$2480**. (If you plan to attempt to secure speakers from the list that Koch Foundation provided, I would suggest that you state such.) (If these guest speaker sessions will be open to the entire campus, I would suggest that you state such and describe the benefit/impact.)

Commented [M Henry2]: Suggest moving Activity Two up under Activity One and leaving the budget info as the last thing in the narrative

Total proposed expenditure: **\$11,420**. (Suggest adjusting your estimated figures a little so you can round up the total cost to \$11,500 or \$12,000, and that will give you a little buffer as well, since these are estimated costs.)

Include your name/title/address/contact info:

From: [Osborne, Evan W.](#)
To: [Culley, Sean](#)
Subject: Fw: Koch Application
Date: Tuesday, September 18, 2018 3:10:57 PM
Attachments: [CKF Proposal with MJ Comments.docx](#)
[WSU Koch Grant Request Letter.docx](#)

"There are such things in the world as human rights. They rest upon no conventional foundation, but are external, universal, and indestructible. Among these, is the right of locomotion; the right of migration; the right which belongs to no particular race, but belongs alike to all and to all alike. It is the right you assert by staying here, and your fathers asserted by coming here. It is this great right that I assert for the Chinese and Japanese, and for all other varieties of men equally with yourselves, now and forever. I know of no rights of race superior to the rights of humanity, and when there is a supposed conflict between human and national rights, it is safe to go to the side of humanity." - Frederick Douglass (1869)

From: Osborne, Evan W.
Sent: Tuesday, August 23, 2016 10:43 AM
To: Henry, Mary Jean
Subject: Re: Koch Application

I am attaching the two documents. I have spoken with someone at the foundation, and she said they agreed already to give me a smaller amount, \$6000, once they receive the application. I propose to start in winter, 2017.

"In this school of intercourse there is one vice I have often noted: instead of paying attention to others, we make it our whole business to call attention to ourselves, and are more concerned to sell our wares than to acquire a new stock." - Montaigne.

From: Henry, Mary Jean
Sent: Monday, August 22, 2016 12:29 PM
To: Osborne, Evan W.
Subject: FW: Koch Application

Congrats on the new title—and good luck!
Once we have your final proposal, we can submit....see my attached comments on your original draft.

Keep me posted.

Thank you,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

[REDACTED] (Office)

[REDACTED] (Fax)

[REDACTED] (Cell)

From: Henry, Mary Jean
Sent: Monday, August 22, 2016 12:18 PM
To: Osborne, Evan W.
Subject: FW: Koch Application

Hello Dr. Osborne,

Hope you are doing well.

Wanted to check with you to see if you still plan to apply to Koch?

Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

[REDACTED] (Office)

[REDACTED] (Fax)

[REDACTED] (Cell)

From: Henry, Mary Jean
Sent: Wednesday, July 27, 2016 2:11 PM
To: Osborne, Evan W.
Cc: Jennifer Ruhl (jennifer.ruhl@wright.edu)
Subject: Koch Application

Hello Dr. Osborne,

Nice to "meet" you via phone today.

As discussed, I've attached the draft cover letter and also your draft proposal where I have included some comments for your consideration to help describe the project and strengthen the proposal.

Also per our discussion, I've copied Jennifer Ruhl to bring her in the loop and to make sure that RSCOB is aware of your proposal.

Please let me know if you have any questions.

Hopefully we should be able to have this completed and ready for submission by the end of the week.

Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

[REDACTED] (Office)

[REDACTED] (Fax)

[REDACTED] (Cell)

The Foundation gives grants to promote activities that will "engage students with the principles of free societies." Toward this end, I propose to promote discussion of both classic and contemporary books that involve these principles. It will be outside of class.

Detailed description: I will manage reading group, to meet five teams over the winter, 2017, and fall, 2017 semesters. (I have done two programs like this in the past for faculty.) The anticipated participation is as 14 students. A book for each of five months will be selected by me and the students together, based on a choice of books I offer them related to the aforementioned Foundation goal. Depending on student preference, we may meet on campus, or at nearby coffee shops or restaurants. If a contemporary book is selected, as many as two authors may each be invited to campus to give a talk or hold a discussion. (In this case, the entire campus, faculty, staff and students, might be invited.)

Budget:

- Books for students: 14 students, five sessions, assumed book price \$30 = \$2100
- Amenities expenses: 14 students, five sessions, assumed expenses \$21 per student = \$1470
- For invited authors, an honorarium of up to \$800 may be paid (I would try to get them for less), as would travel expenses. Travelocity currently lists round-trip flights between Dayton and New York City at \$250, and a hotel close to campus would cost perhaps \$165. Doing this twice a year, this would sum to \$1215 x 2 = \$2430.

Total proposed expenditure: \$6000.

Evan Osborne, Professor
Wright State University, Department of Economics
3640 Col. Glenn Hwy.
Dayton, OH 45435

Deleted: Add an introductory paragraph that includes:
The goal of your project
Types of "topics" that will be addressed through the activities
Description of the students involved (in a certain academic program or class?)
How your activities support the goals/mission of the Koch Foundation

Deleted: Activity one

Deleted: once a month in the

Deleted: 6

Deleted: 9

Deleted: high as 20

Deleted: month

Deleted: (Based on what criteria? What Koch-related ther

Deleted: depending

Deleted: it

Deleted: It is possible that

Deleted: i

Deleted: the

Deleted: 1

Deleted: 20

Deleted: seven

Deleted: months

Deleted: 4200

Commented [M Henry1]: I would suggesting going the cof

Deleted: Food/drink

Deleted: 20

Deleted: seven months

Deleted: 5

Deleted: (assuming we go to restaurant; will be less if hel

Deleted: 35

Deleted: 00

Deleted: <#>1

Deleted: <#>10

Deleted: <#>20

Deleted: <#>Assuming flights might cost as much as \$50

Deleted: <#>d

Deleted: <#>equal

Deleted: <#>240

Deleted: <#>each

Deleted: Activity two: In addition, at most once each

Deleted: 11,420

Deleted: (Suggest adjusting your estimated figures a little

Deleted: 1

Deleted: :

Foundation Letterhead

August 22, 2016

Mr. Stephen Sweet
Charles Koch Foundation
1515 North Courthouse Road
Suite 200
Arlington, VA 22201

To whom it may concern:

Wright State University Foundation respectfully requests a grant in the amount of \$6000 to be used to support the following program at Wright State University:

- Student Book Review/Discussion for \$6000

The proposed activities will take place from January 1, 2017 to December 31, 2017.

The above program, which will be under the full control and supervision of the Wright State University Foundation and the Wright State University Raj Soin College of Business, will be carried out by Evan W. Osborne, Ph.D., professor of economics.

Should a grant be awarded by the Charles Koch Foundation, a check made payable to the Wright State University Foundation should be sent to:

Mary Jean Henry
Director of Foundation and Corporate Relations
Wright State University
3640 Colonel Glenn Hwy
Dayton, OH 45435

Any grant awarded shall be expended exclusively for charitable purposes described in Code section 170(c)(2)(B) and no part of the grant will be used for a lobbying purpose or to engage in any political activity.

Please do not hesitate to contact me if you have any questions about the above-mentioned grant request.

Mary Jean Henry, M.Ed.
Director of Foundation and Corporate Relations
Wright State University
Office of Advancement
3640 Colonel Glenn Hwy
Dayton, OH 45435

Enclosures:

IRS Non-Profit Determination Letter

Proposal Document

From: [Osborne, Evan W.](#)
To: [Culley, Sean](#)
Subject: Fw: Koch Foundation Grant Check Has Arrived
Date: Tuesday, September 18, 2018 3:09:42 PM
Attachments: [Wright State Grant Application Letter.pdf](#)
[New Fund Form.docx](#)
[Koch Award Letter.pdf](#)

"There are such things in the world as human rights. They rest upon no conventional foundation, but are external, universal, and indestructible. Among these, is the right of locomotion; the right of migration; the right which belongs to no particular race, but belongs alike to all and to all alike. It is the right you assert by staying here, and your fathers asserted by coming here. It is this great right that I assert for the Chinese and Japanese, and for all other varieties of men equally with yourselves, now and forever. I know of no rights of race superior to the rights of humanity, and when there is a supposed conflict between human and national rights, it is safe to go to the side of humanity." - Frederick Douglass (1869)

From: Henry, Mary Jean
Sent: Wednesday, October 5, 2016 4:24 PM
To: Osborne, Evan W.
Cc: Ruhl, Jennifer
Subject: Koch Foundation Grant Check Has Arrived

Hello Dr. Osborne,

The Foundation has received the \$6,000 grant check from the Charles Koch Foundation in support of your Student Book Review/Discussion Program. Please note: the award letter (copy attached) states that you *will not use the Koch Foundation's name or logo without express written consent*.

Please provide me with the account number, as requested below, for deposit of funds.

Congratulations!

Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University

Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

[REDACTED] (Office)

[REDACTED] (Fax)

[REDACTED] (Cell)

From: Henry, Mary Jean
Sent: Tuesday, September 20, 2016 10:43 AM
To: Osborne, Evan W.
Cc: Jennifer Ruhl (jennifer.ruhl@wright.edu)
Subject: Koch Foundation Grant

Hello Dr. Osborne,

I've been in contact with Kristin at the Koch Foundation regarding your application. She had requested a revised cover letter to complete the application (attached for your records), and some additional WSU tax documentation, which I provided.

Per my conversation with Kristin today, the grant has been approved and we should receive the funds in early-mid October. Congratulations!!

Meanwhile, could you please provide the Foundation account name/number for these funds (a six digit number beginning with "55") so that we are ready make the deposit when the funds arrive. If you need to create a new account, please use the attached form and submit it to Tracy McKellar, Advancement Services (@Foundation Building, tracey.mckellar@wright.edu, x2766. If you have questions regarding the appropriate fund account, your college business manager would likely be able to assist you.

Regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435
[REDACTED] (Office)

[REDACTED] (Fax)

[REDACTED] (Cell)

From: Henry, Mary Jean
Sent: Tuesday, August 30, 2016 6:04 PM
To: Osborne, Evan W.
Cc: Jennifer Ruhl (jennifer.ruhl@wright.edu)
Subject: Koch Foundation

Hello Dr. Osborne,

I forwarded your grant request to the Koch Foundation today. Copy attached for your files.

Good luck!

Mary Jan

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

[REDACTED] (Office)

[REDACTED] (Fax)

[REDACTED] (Cell)



Foundation and Corporate Relations
3640 Colonel Glenn Hwy.
Dayton, OH 45435-0001
(937) 775-2945
FAX (937) 775-2736
Toll free (800) 535-0688

August 31, 2016

Charles Koch Foundation
1320 North Courthouse Road
Suite 500
Arlington, VA 22201

To whom it may concern:

Wright State University respectfully requests a grant in the amount of \$6,000 to be used for the following activities during January 1, 2017 through December 31, 2017:

- Student Book Review/Discussion

The above program will be under the control and supervision of Wright State University and the direction of Evan W. Osborne, Ph.D., professor of economics in the Raj Soin College of Business, who was selected by Wright State University.

Should a grant be awarded by the Charles Koch Foundation, a check made payable to the Wright State University Foundation, which is acting as the fiscal agent for this grant, should be sent to:

Mary Jean Henry
Director of Foundation and Corporate Relations
Wright State University
3640 Colonel Glenn Hwy
Dayton, OH 45435

According to the information furnished with this request, Wright State University is a state instrumentality qualified under Internal Revenue Code section 170(c)(1) or 511(a)(2)(B).

Any grant awarded shall be expended exclusively for charitable purposes described in Code section 170(c)(2)(B) and no part of the grant will be used for a lobbying purpose or to engage in any political activity.

Please do not hesitate to contact me if you have any questions about the above-mentioned grant request.

Regards,

Mary Jean Henry, M.Ed.
Director of Foundation and Corporate Relations
Office of Advancement
Wright State University
Dayton OH 45435
937-775-3615



REQUEST FOR NEW FOUNDATION FUND

Person Requesting Fund:

Fund Type:

(Select One)

☒ Endowment (donor designated) ☐ Quasi-endowment (university designated) ☐ Current Use
☐ Intent to Endow

College/Division:

Responsible Department Name:

Departmental Banner Org Code:

Responsible Person:

(Name & Title)

Address of Responsible Person:

Room #:

Building:

Fund Name:

(Spell out abbreviations)

Fund Start Date:

Fund Close Date (if applicable):

Purpose/Restrictions of Fund:

(up to 160 spaces)

For Development Officers:

Will there be an Agreement (Endowment/Pledge) to follow?

FOR FOUNDATION USE ONLY:



September 16, 2016

Dr. David Hopkins
President
Wright State University
062 Rike Hall
Dayton, OH 45435-0001

Dear Dr. Hopkins:

Pursuant to the request of Wright State University ("University"), we are happy to award a grant in the amount of \$6,000.00 for a guest speaker series and a reading group under the control and supervision of the University, and the direction of Dr. Evan Osborne, who was selected by the University. As requested, a check made payable to the Wright State University Foundation has been mailed to Ms. Mary Jean Henry, and may not be cashed without the University's countersignature to this letter agreement. We understand the Wright State University Foundation is acting as the fiscal agent for this grant.

According to the information furnished to us records, your organization is qualified as an organization described in Code section 170(c)(1) or 511(a)(2)(B). You agree to inform us immediately of a change in your organization's tax status.

You agree that the grant will be expended only for an educational, scientific, literary, or other charitable purpose described in Section 170(c)(2)(B) of the Internal Revenue Code ("Code"), and that the grant will not be used to influence legislation, to influence the outcome of any election, for a political campaign or intervention, or to carry on any voter registration drive. We must ask that any funds not expended for the purposes described in Code section 170(c)(2)(B), for which the grant is being made, be returned to us.

The terms and conditions contained in this letter agreement supersede all prior oral or written agreements and understandings between the parties and shall constitute the entire agreement between the parties with respect to the matters contained herein. This letter agreement shall not be modified or amended except by a writing duly executed by parties hereto. At our discretion and upon your acceptance, we and our affiliates may provide you with support related to this grant, such as in-kind services and educational opportunities. You agree not to use the Foundation's name or logo without our express written consent.

Please indicate your agreement with these conditions by returning a signed copy of this letter to the Foundation, attention Grants Administration.

Sincerely,



Brian Hooks
President

cc: Ms. Mary Jean Henry, Dr. Evan Osborne

**Acknowledged and Agreed to by an Authorized Representative of
Wright State University**

By: _____

Print Name: _____

Title: _____

Date: _____

From: [Osborne, Evan W.](#)
To: [Culley, Sean](#)
Subject: Fw: Quick Call
Date: Tuesday, September 18, 2018 3:11:16 PM
Attachments: [CKF Proposal.docx](#)

"There are such things in the world as human rights. They rest upon no conventional foundation, but are external, universal, and indestructible. Among these, is the right of locomotion; the right of migration; the right which belongs to no particular race, but belongs alike to all and to all alike. It is the right you assert by staying here, and your fathers asserted by coming here. It is this great right that I assert for the Chinese and Japanese, and for all other varieties of men equally with yourselves, now and forever. I know of no rights of race superior to the rights of humanity, and when there is a supposed conflict between human and national rights, it is safe to go to the side of humanity." - Frederick Douglass (1869)

From: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>
Sent: Monday, August 22, 2016 12:49 PM
To: Osborne, Evan W.
Subject: RE: Quick Call

Hi Evan,

You may apply for whatever amount – either the one you initially proposed (\$11,420) or the awarded amount (\$6,000).

Hope you had a nice trip moving your son into college!

Kristin

From: Osborne, Evan W. [mailto:evan.osborne@wright.edu]
Sent: Monday, August 22, 2016 12:37 PM
To: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>
Subject: Re: Quick Call

Sent by an external sender

Kristen,

I am finalizing the grant-application letter. When we spoke a little while ago I seem to have

written everything down but the amount of money you said I should apply for. What is the amount? (Something like \$6000.)

Evan

Sent from my iPad

On Aug 17, 2016, at 12:55 PM, Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org> wrote:

Evan,

Thanks for the call today. As mentioned, I'll keep an eye out for the request letter.

Attached is some additional information on our [educational programs](#). KIP and KFP are semester long programs for undergrads or recent grads; KAP and L@W are year-long programs for college grads. I figure that some of the reading group students may find these programs to be of interest. If you'd like more information, I'm happy to mail a box of hand-outs.

Best of luck moving your son to college!

Kristin

-----Original Message-----

From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]

Sent: Wednesday, August 17, 2016 9:46 AM

To: Ellis, Kristin

Subject: Re: Quick Call

Sent by an external sender

Ok.

Sent from my iPad

> On Aug 17, 2016, at 7:43 AM, Ellis, Kristin
> <Kristin.Ellis@charleskochfoundation.org> wrote:

>

> How exciting! Will 11am ET work?

>

> -----Original Message-----

> From: Osborne, Evan W. [<mailto:evan.osborne@wright.edu>]

> Sent: Tuesday, August 16, 2016 7:28 PM

> To: Ellis, Kristin

> Subject: Re: Quick Call

>

> Sent by an external sender

>

> -----

> Yes. I do have to start my 3-day trip home on Thursday, and have to take our child to college tomorrow. But in the morning (before noon EDT) I might have time. Otherwise we will probably have to wait Monday.

>

> If you can, give me 3 or 4 times that work for you Wednesday morning, and I'll pick the one that works best.

>

> Evan

>

> Sent from my iPad

>

>> On Aug 16, 2016, at 4:29 PM, Ellis, Kristin
<Kristin.Ellis@charleskochfoundation.org> wrote:

>>

>> Evan-

>>

>> Do you have time for a quick call (15-20 mins) sometime this week to discuss your request?

>>

>> Kristin

>>

>>

>>

>> Sent with Good (www.good.com)

<CKICKF Booklet_PDF.PDF>

<EP Inserts_KAPLAW.PDF>

<EP Inserts_KIPKFP.PDF>

Activity 1: reading group, to meet once a month in the winter and fall semesters. The anticipated participation is as high as 20 students. A book for each month will be selected by me and the students together. Depending on student preference, we may meet on campus, or at nearby coffee shops or restaurants. It is possible that if a contemporary book is selected, the author may be invited to campus to give a talk or hold a discussion. (In this case, the entire campus might be invited.)

Budget:

- Books for students: 20 students, seven months, assumed book price \$30 = **\$4200**
- Food/drink expenses: 20 students, seven months, assumed expenses \$25 per student (assuming we go to restaurant; will be less if held at coffee shop or on campus) = **\$3500**
- For invited authors, an honorarium of up to \$1000 may be paid (I would try to get them for less), as would travel expenses. Travelocity currently lists round-trip flights between Dayton and New York City at \$250, and a hotel close to campus would cost perhaps \$120. Assuming flights might cost as much as \$500 and doing this twice a year, this would equal **\$1240**.

Activity 2: In addition, at most once each semester I propose a separate event, open to the entire campus, in which one or two speakers would be invited to campus to make a speech or have a debate on a theme related to the Charles Koch Foundation's areas of interest. The maximum amount required would be, using the above prices, one night in a hotel plus plane fare, this time for two people, costing as much as **\$2480**.

Total proposed expenditure for the year: **\$11,420**.

From: [Osborne, Evan W.](#)
To: [Culley, Sean](#)
Subject: Fw: RE: C. Koch Foundation
Date: Tuesday, September 18, 2018 3:19:07 PM

"There are such things in the world as human rights. They rest upon no conventional foundation, but are external, universal, and indestructible. Among these, is the right of locomotion; the right of migration; the right which belongs to no particular race, but belongs alike to all and to all alike. It is the right you assert by staying here, and your fathers asserted by coming here. It is this great right that I assert for the Chinese and Japanese, and for all other varieties of men equally with yourselves, now and forever. I know of no rights of race superior to the rights of humanity, and when there is a supposed conflict between human and national rights, it is safe to go to the side of humanity." - Frederick Douglass (1869)

From: Henry, Mary Jean
Sent: Friday, June 24, 2016 1:47 PM
To: Lundin, Deborah Lynn
Cc: Osborne, Evan W.; Ruhl, Jennifer
Subject: RE: RE: C. Koch Foundation

Hello Deborah,

Thank you for bringing this to my attention. Upon review of the attachment and the Koch website, it appears to me that it would come through the Wright State University Foundation. A few indicators that it would be considered a "gift" are the fact that they don't fund overhead, and it doesn't appear that there are any tight restrictions on "owning" any of the results or activities in any way. Although, I was unable to find any information on grant reporting requirements.

I encourage Dr. Osborne to coordinate this application through my office, and also to include Jennifer Ruhl, the RSCOB Director of Development (copied here).

Hope this helps.

Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement

Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

[REDACTED] (Office)

[REDACTED] (Fax)

[REDACTED] (Cell)

From: Lundin, Deborah Lynn
Sent: Friday, June 24, 2016 11:29 AM
To: Henry, Mary Jean
Cc: Osborne, Evan W.
Subject: RE: C. Koch Foundation
Importance: High

Good morning, Mary Jean,

Dr. Evan Osborne, Professor of Economics in the RSCOB (copied on this email), is interested in pursuing the Charles Koch Foundation for a project interest. At first blush it is unclear if it should come through RSP or through your area. The word charitable comes up a time or two, though in larger reference to a category of acceptable activities. Could you review at your earliest convenience for your recommendation so that Dr. Osborne can move forward with his proposal with the office most appropriate to facilitating its submission?

Thank you!

Deborah

Deborah Lundin, Ed.D., CRA
Associate Director, Pre Award Services
Research and Sponsored Programs
240 University Hall
Wright State University
3640 Colonel Glenn Highway
Dayton, Ohio 45435-0001
(p) [REDACTED] (f) [REDACTED]
<http://www.wright.edu/research/research-and-sponsored-programs>

Research and Sponsored Programs | Wright State University

www.wright.edu

Wright State University's Office of Research and Sponsored Programs (RSP) is a comprehensive network of supportive services dedicated to working with faculty and staff to increase externally funded research, scholarly activities, and other sponsored programs. Knowledgeable, experienced RSP staff provides pre-award and post-award support, compliance coordination,

and technology

RSP INTERNAL

DEADLINES

****5 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE **RSP** MUST RECEIVE: THE FINAL BUDGET (REQUESTED AND COST SHARE), BUDGET JUSTIFICATION, AND ABSTRACT.***

****2 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE, THE COMPLETE PROPOSAL READY FOR SUBMISSION IS DUE AT **RSP**.***

From: [Osborne, Evan W.](#)
To: [Culley, Sean](#)
Subject: Fw: RE: C. Koch Foundation
Date: Tuesday, September 18, 2018 3:17:18 PM

"There are such things in the world as human rights. They rest upon no conventional foundation, but are external, universal, and indestructible. Among these, is the right of locomotion; the right of migration; the right which belongs to no particular race, but belongs alike to all and to all alike. It is the right you assert by staying here, and your fathers asserted by coming here. It is this great right that I assert for the Chinese and Japanese, and for all other varieties of men equally with yourselves, now and forever. I know of no rights of race superior to the rights of humanity, and when there is a supposed conflict between human and national rights, it is safe to go to the side of humanity." - Frederick Douglass (1869)

From: Lundin, Deborah Lynn
Sent: Tuesday, June 28, 2016 9:25 AM
To: Henry, Mary Jean
Cc: Osborne, Evan W.; Ruhl, Jennifer
Subject: RE: RE: C. Koch Foundation

Mary Jean,

Thanks for the quick turnaround review.

Dr. Osborne, if you haven't already begun, please coordinate the submission of this proposal with the Office of Advancement, and I wish you the best of luck on it.

Appreciatively,

Deborah

Deborah Lundin, Ed.D., CRA
Associate Director, Pre Award Services
Research and Sponsored Programs
240 University Hall
Wright State University
3640 Colonel Glenn Highway
Dayton, Ohio 45435-0001

(p) [REDACTED] (f) [REDACTED]

<http://www.wright.edu/research/research-and-sponsored-programs>

Research and Sponsored Programs | Wright State University

www.wright.edu

Wright State University's Office of Research and Sponsored Programs (RSP) is a comprehensive network of supportive services dedicated to working with faculty and staff to increase externally funded research, scholarly activities, and other sponsored programs. Knowledgeable, experienced RSP staff provides pre-award and post-award support, compliance coordination, and technology

RSP INTERNAL

DEADLINES

****5 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE RSP MUST RECEIVE: THE FINAL BUDGET (REQUESTED AND COST SHARE), BUDGET JUSTIFICATION, AND ABSTRACT.***

****2 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE, THE COMPLETE PROPOSAL READY FOR SUBMISSION IS DUE AT RSP.***

From: Henry, Mary Jean

Sent: Friday, June 24, 2016 1:47 PM

To: Lundin, Deborah Lynn <deborah.lundin@wright.edu>

Cc: Osborne, Evan W. <evan.osborne@wright.edu>; Ruhl, Jennifer <jennifer.ruhl@wright.edu>

Subject: RE: RE: C. Koch Foundation

Hello Deborah,

Thank you for bringing this to my attention. Upon review of the attachment and the Koch website, it appears to me that it would come through the Wright State University Foundation. A few indicators that it would be considered a "gift" are the fact that they don't fund overhead, and it doesn't appear that there are any tight restrictions on "owning" any of the results or activities in any way. Although, I was unable to find any information on grant reporting requirements.

I encourage Dr. Osborne to coordinate this application through my office, and also to include Jennifer Ruhl, the RSCOB Director of Development (copied here).

Hope this helps.

Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

[REDACTED] (Office)

[REDACTED] (Fax)

[REDACTED] (Cell)

From: Lundin, Deborah Lynn
Sent: Friday, June 24, 2016 11:29 AM
To: Henry, Mary Jean
Cc: Osborne, Evan W.
Subject: RE: C. Koch Foundation
Importance: High

Good morning, Mary Jean,

Dr. Evan Osborne, Professor of Economics in the RSCOB (copied on this email), is interested in pursuing the Charles Koch Foundation for a project interest. At first blush it is unclear if it should come through RSP or through your area. The word charitable comes up a time or two, though in larger reference to a category of acceptable activities. Could you review at your earliest convenience for your recommendation so that Dr. Osborne can move forward with his proposal with the office most appropriate to facilitating its submission?

Thank you!

Deborah

Deborah Lundin, Ed.D., CRA
Associate Director, Pre Award Services
Research and Sponsored Programs
240 University Hall
Wright State University
3640 Colonel Glenn Highway
Dayton, Ohio 45435-0001

(p) [REDACTED] (f) [REDACTED]

<http://www.wright.edu/research/research-and-sponsored-programs>

RSP INTERNAL

DEADLINES

****5 BUSINESS DAYS PRIOR TO SUBMISSION DEADLINE RSP MUST RECEIVE: THE FINAL BUDGET (REQUESTED AND COST SHARE),***

BUDGET JUSTIFICATION, AND ABSTRACT.

****2 BUSINESS DAYS** PRIOR TO SUBMISSION DEADLINE, THE COMPLETE PROPOSAL READY FOR SUBMISSION IS DUE AT **RSP**.*

PIES (Partners In Integrated Earth Systems Science) is a three phase long-term professional development program to increase the integrated science content, pedagogical, and technological knowledge of teams of K-12 teachers in the Hillsboro City Schools, Middletown City Schools and Franklin City Schools. Hillsboro City Schools will be the leading district with high need areas, which not less than 20% of the children served are from families with income below the poverty line. The 24 teachers participating in Project PIES will serve as catalyst and mentors to other teachers and will drive curriculum change in the district to meet the Ohio Revised Science Standards and the Common Core Standards. Project PIES will effect these changes by using a three-phase research based approach to classroom educator professional development. Phase I is composed of a one week field experience followed by a week long laboratory experience. The field trip will take participants to the Atlantic Ocean to study the physical and biological processes that interact to form the modern ocean environment compared to the ancient ocean sediments preserved around the Atlantic Coastal Plain around the Duke University research institute. The field experience will be guided inquiry based questions allowing participants to build their content and pedagogical understandings. Following the inquiry based field trip, participants will gather for a week of laboratory work, participating in inquiry based learning with samples collected from the field, and developing ideas to integrate inquiry based integrated science activities into their own classrooms. Continuing this process, phase II of project PIES, is a four-week long Internet course designed to assist participants in developing classroom applications connected to the Common Core Standards. The teams of classroom educators will develop, implement and assess inquiry based integrated science activities in their own classrooms. Phase III will provided further support and contact with participants and project personnel with bi-monthly web conferences during the academic year. Assessment of the project will be both formative and summative, and will focus on changes in the cognitive and affective domains of both classroom educators and their students.

As a result of project PIES, partner schools will have teams of teachers experienced in inquiry based integrated Physical Science, Life Science, Earth/Space science content, Mathematical processes best pedagogical practices and the use of the Internet technology and analytical instrumentation technology. Participants will also have the opportunity to collect water, sediment samples, fossils, specimens of igneous, metamorphic and sedimentary rocks and take slides for their schools' classrooms. Teachers participating in project PIES will be agents of change, leading their districts' efforts to produce scientifically literate students in STEM disciplines and citizenry well versed in the skills that will be needed to ensure Ohio's economic future and meet Ohio's Learning Standards (Ohio Revised Standards in Science and Common Core).

Culley, Sean

From: Henry, Mary Jean
Sent: Thursday, September 15, 2016 1:03 PM
To: 'Ellis, Kristin'
Subject: RE: Revised Application from Wright State
Attachments: WSU State Instrumentality Verification.pdf; Ohio Revised Code 3352.pdf; WSU 990Tfy15.pdf

Hello Kristin,


Thank you for your patience in working with us to secure the appropriate documentation. Attached please find:

- State instrumentality verification letter
- Applicable Ohio Revised Code
- Wright State 990

Please let me know if you need additional materials.

We are so happy to hear that funding has been approved!

Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435
 (Office)
(Fax)
(Cell)

From: Ellis, Kristin [mailto:Kristin.Ellis@charleskochfoundation.org]
Sent: Friday, September 09, 2016 9:22 AM
To: Henry, Mary Jean
Subject: RE: Revised Application from Wright State

Sounds good – thank you.

Kristin Ellis
University Investments
Charles Koch Foundation
O: 
M: 
charleskochfoundation.org

From: Henry, Mary Jean [<mailto:mary.jean.henry@wright.edu>]
Sent: Friday, September 09, 2016 9:15 AM
To: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>
Subject: Re: Revised Application from Wright State

Sent by an external sender

Hello Kristin,

Thank you for your followup. I'm traveling this week but will take care of this when I return to the office next week.

Regards,
Mary Jean

Sent from my iPhone

On Sep 8, 2016, at 5:24 PM, "Ellis, Kristin" <Kristin.Ellis@charleskochfoundation.org> wrote:

Mary Jean,

So sorry for an additional follow up, but would you be able to supply us with a tax status determination letter that's dated sometime in the past 5 years? In order to disburse, we need documentation signed by the university's legal or tax dept. (or alternately, posted on an official webpage) stating that the university is a political subdivision or state instrumentality as determined by the IRS.

Please let me know if you have any questions.

My thanks,
Kristin

Kristin Ellis

University Investments
Charles Koch Foundation

O: 

M: 
charleskochfoundation.org

From: Ellis, Kristin
Sent: Thursday, September 01, 2016 4:42 PM
To: 'Henry, Mary Jean' <mary.jean.henry@wright.edu>
Subject: RE: Revised Application from Wright State

Mary Jean,

This should work – thank you so much. We will work on getting the check out to WSUF in the next few weeks.

Kristin

From: Henry, Mary Jean [<mailto:mary.jean.henry@wright.edu>]
Sent: Wednesday, August 31, 2016 4:50 PM

To: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>

Subject: Revised Application from Wright State

Sent by an external sender

Hello Kristin,

Thank you so much for all of your help. I hope I got it right this time. Please let me know if not.

Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435



(Office)
(Fax)
(Cell)

Culley, Sean

From: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>
Sent: Wednesday, October 05, 2016 5:17 PM
To: Henry, Mary Jean
Subject: RE: Revised Application from Wright State

Fantastic – thanks, Mary Jean!

Kristin Ellis

University Investments
Charles Koch Foundation

O: [REDACTED]
M: [REDACTED]
charleskochfoundation.org

From: Henry, Mary Jean [mailto:mary.jean.henry@wright.edu]
Sent: Wednesday, October 05, 2016 4:49 PM
To: Ellis, Kristin
Subject: RE: Revised Application from Wright State
Sent by an external sender

Kristin,
I received the check today! We will returned the signed copy promptly. Thank you so much for all of your help?
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435
[REDACTED] (Office)
[REDACTED] (Fax)
[REDACTED] (Cell)

From: Ellis, Kristin [mailto:Kristin.Ellis@charleskochfoundation.org]
Sent: Tuesday, October 04, 2016 6:01 PM
To: Henry, Mary Jean
Subject: RE: Revised Application from Wright State
Mary Jean – we are overnighting the check today. You should receive it tomorrow.
Thank you,

Kristin Ellis

University Investments
Charles Koch Foundation

O: [REDACTED]
M: [REDACTED]
charleskochfoundation.org

From: Henry, Mary Jean [mailto:mary.jean.henry@wright.edu]
Sent: Thursday, September 15, 2016 1:03 PM

To: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>

Subject: RE: Revised Application from Wright State

Sent by an external sender

Hello Kristin,

Thank you for your patience in working with us to secure the appropriate documentation. Attached please find:

- State instrumentality verification letter
- Applicable Ohio Revised Code
- Wright State 990

Please let me know if you need additional materials.

We are so happy to hear that funding has been approved!

Best regards,

Mary Jean

Mary Jean Henry, M.Ed.

Director of Foundation and Corporations

Wright State University

Office of Advancement

Foundation Building

3640 Colonel Glenn Hwy.

Dayton, OH 45435

(Office)

(Fax)

(Cell)

From: Ellis, Kristin [<mailto:Kristin.Ellis@charleskochfoundation.org>]

Sent: Friday, September 09, 2016 9:22 AM

To: Henry, Mary Jean

Subject: RE: Revised Application from Wright State

Sounds good – thank you.

Kristin Ellis

University Investments

Charles Koch Foundation

O: [REDACTED]

M: [REDACTED]

charleskochfoundation.org

From: Henry, Mary Jean [<mailto:mary.jean.henry@wright.edu>]

Sent: Friday, September 09, 2016 9:15 AM

To: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>

Subject: Re: Revised Application from Wright State

Sent by an external sender

Hello Kristin,

Thank you for your followup. I'm traveling this week but will take care of this when I return to the office next week.

Regards,

Mary Jean

Sent from my iPhone

On Sep 8, 2016, at 5:24 PM, "Ellis, Kristin" <Kristin.Ellis@charleskochfoundation.org> wrote:

Mary Jean,

So sorry for an additional follow up, but would you be able to supply us with a tax status determination letter that's dated sometime in the past 5 years? In order to disburse, we need documentation signed by the university's legal or tax dept. (or alternately, posted on an official webpage) stating that the university is a political subdivision or state instrumentality as determined by the IRS.

Please let me know if you have any questions.

My thanks,

Kristin

Kristin Ellis

University Investments

Charles Koch Foundation

O: [REDACTED]

M: [REDACTED]

charleskochfoundation.org

From: Ellis, Kristin

Sent: Thursday, September 01, 2016 4:42 PM

To: 'Henry, Mary Jean' <mary.jean.henry@wright.edu>

Subject: RE: Revised Application from Wright State

Mary Jean,

This should work – thank you so much. We will work on getting the check out to WSUF in the next few weeks.

Kristin

From: Henry, Mary Jean [<mailto:mary.jean.henry@wright.edu>]

Sent: Wednesday, August 31, 2016 4:50 PM

To: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>

Subject: Revised Application from Wright State

Sent by an external sender

Hello Kristin,

Thank you so much for all of your help. I hope I got it right this time. Please let me know if not.

Best regards,

Mary Jean

Mary Jean Henry, M.Ed.

Director of Foundation and Corporations

Wright State University

Office of Advancement

Foundation Building

3640 Colonel Glenn Hwy.

Dayton, OH 45435

[REDACTED] (Office)

[REDACTED] (Fax)

[REDACTED] (Cell)

Culley, Sean

From: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>
Sent: Tuesday, August 30, 2016 6:25 PM
To: Henry, Mary Jean
Subject: RE: Wright State Grant Application From Evan Osborne
Attachments: Grant Letter 5 - University with Fiscal Agent Letter.docx

Mary Jean,

Thank you for passing this along.

The request letter template that we sent along includes the clause “and the direction of [faculty driver], who was selected by Wright State University.” The “selected by” language is important to us, as it affirms Dr. Osborne’s academic freedom. Might you be able to include this in an updated request?

We were also under the impression that the university would be the requestor rather than the university foundation. If you prefer the university foundation, we are happy to work with that, though we would kindly ask that you use the attached request letter template. You’ll see that this template states that the Foundation is a fiscal agent (in this template, “grantee” is always the university).

Feel free to write me a line or give me a ring at [REDACTED] if you have any questions.

Kristin

From: Henry, Mary Jean [mailto:mary.jean.henry@wright.edu]
Sent: Tuesday, August 30, 2016 6:03 PM
To: Ellis, Kristin
Subject: Wright State Grant Application From Evan Osborne

Sent by an external sender

Hello Kristin,

Please see attached grant application from Wright State University which I am submitting on behalf of Evan Osborne.

Thank you for your earlier conversations with both Dr. Osborne and myself—very helpful.

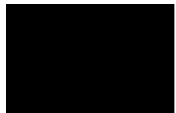
Please let me know if you need additional information.

Regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building

3640 Colonel Glenn Hwy.

Dayton, OH 45435



(Office)

(Fax)

(Cell)

From: Henry, Mary Jean

Sent: Tuesday, August 30, 2016 5:59 PM

To: 'Kristin.Ellis@charleskochfoundation.org'

Subject: Wright State Grant Application

Mary Jean Henry, M.Ed.

Director of Foundation and Corporations

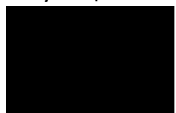
Wright State University

Office of Advancement

Foundation Building

3640 Colonel Glenn Hwy.

Dayton, OH 45435



(Office)

(Fax)

(Cell)

Culley, Sean

From: Henry, Mary Jean
Sent: Wednesday, August 31, 2016 4:50 PM
To: 'Kristin.Ellis@charleskochfoundation.org'
Subject: Revised Application from Wright State
Attachments: Wright State Grant App, Osborne.pdf

Hello Kristin,

Thank you so much for all of your help. I hope I got it right this time. Please let me know if not.

Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

 (Office)

(Fax)

(Cell)

Culley, Sean

From: Henry, Mary Jean
Sent: Tuesday, August 30, 2016 6:03 PM
To: 'Kristin.Ellis@charleskochfoundation.org'
Subject: Wright State Grant Application From Evan Osborne
Attachments: Wright State Grant Application, Osborne.pdf

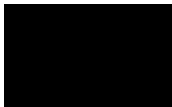
Hello Kristin,

Please see attached grant application from Wright State University which I am submitting on behalf of Evan Osborne.

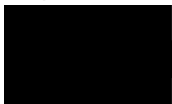
Thank you for your earlier conversations with both Dr. Osborne and myself—very helpful.

Please let me know if you need additional information.

Regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435
 (Office)
(Fax)
(Cell)

From: Henry, Mary Jean
Sent: Tuesday, August 30, 2016 5:59 PM
To: 'Kristin.Ellis@charleskochfoundation.org'
Subject: Wright State Grant Application

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435
 (Office)
(Fax)
(Cell)

Culley, Sean

From: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>
Sent: Thursday, September 08, 2016 5:22 PM
To: Henry, Mary Jean
Subject: RE: Revised Application from Wright State

Mary Jean,

So sorry for an additional follow up, but would you be able to supply us with a tax status determination letter that's dated sometime in the past 5 years? In order to disburse, we need documentation signed by the university's legal or tax dept. (or alternately, posted on an official webpage) stating that the university is a political subdivision or state instrumentality as determined by the IRS.

Please let me know if you have any questions.

My thanks,

Kristin

Kristin Ellis

University Investments

Charles Koch Foundation

O: [REDACTED]

M: [REDACTED]

charleskochfoundation.org

From: Ellis, Kristin
Sent: Thursday, September 01, 2016 4:42 PM
To: 'Henry, Mary Jean'
Subject: RE: Revised Application from Wright State

Mary Jean,

This should work – thank you so much. We will work on getting the check out to WSUF in the next few weeks.

Kristin

From: Henry, Mary Jean [<mailto:mary.jean.henry@wright.edu>]
Sent: Wednesday, August 31, 2016 4:50 PM
To: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>
Subject: Revised Application from Wright State
Sent by an external sender

Hello Kristin,

Thank you so much for all of your help. I hope I got it right this time. Please let me know if not.

Best regards,

Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

[REDACTED] (Office)

[REDACTED] (Fax)

[REDACTED] (Cell)

Culley, Sean

From: Henry, Mary Jean
Sent: Friday, September 09, 2016 9:15 AM
To: Ellis, Kristin
Subject: Re: Revised Application from Wright State

Hello Kristin,

Thank you for your followup. I'm traveling this week but will take care of this when I return to the office next week.

Regards,
Mary Jean

Sent from my iPhone

On Sep 8, 2016, at 5:24 PM, "Ellis, Kristin" <Kristin.Ellis@charleskochfoundation.org> wrote:

Mary Jean,
So sorry for an additional follow up, but would you be able to supply us with a tax status determination letter that's dated sometime in the past 5 years? In order to disburse, we need documentation signed by the university's legal or tax dept. (or alternately, posted on an official webpage) stating that the university is a political subdivision or state instrumentality as determined by the IRS.
Please let me know if you have any questions.

My thanks,
Kristin

Kristin Ellis
University Investments
Charles Koch Foundation

O: [REDACTED]
M: [REDACTED]

charleskochfoundation.org

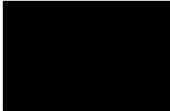
From: Ellis, Kristin
Sent: Thursday, September 01, 2016 4:42 PM
To: 'Henry, Mary Jean' <mary.jean.henry@wright.edu>
Subject: RE: Revised Application from Wright State

Mary Jean,
This should work – thank you so much. We will work on getting the check out to WSUF in the next few weeks.
Kristin

From: Henry, Mary Jean [<mailto:mary.jean.henry@wright.edu>]
Sent: Wednesday, August 31, 2016 4:50 PM
To: Ellis, Kristin <Kristin.Ellis@charleskochfoundation.org>
Subject: Revised Application from Wright State
Sent by an external sender

Hello Kristin,
Thank you so much for all of your help. I hope I got it right this time. Please let me know if not.
Best regards,
Mary Jean

Mary Jean Henry, M.Ed.
Director of Foundation and Corporations
Wright State University
Office of Advancement
Foundation Building
3640 Colonel Glenn Hwy.
Dayton, OH 45435

 (Office)
(Fax)
(Cell)